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ABSTRACT

This guide to procedures for identifying gifted and talented children in Oregon outlines requirements of legislation and administrative regulations. The procedures describe steps in the identification process, including referral, screening, testing, and final selection/parent notification. The importance of identifying children when very young, using multiple criteria, and utilizing a case study approach is stressed. Obstacles to identification of the nontypical gifted, such as cultural and ethnic minorities, economically disadvantaged, underachievers, or handicapped, are discussed, along with techniques for overcoming the obstacles. A bibliography lists four references on identification and approximately 50 references on the nontypical gifted. Appendices contain procedures for selecting a group mental ability test; sample forms, letters, and identification materials, including teacher, parent, and self referral forms; descriptions of possible tests for use in measuring talent and giftedness; a glossary of technical terms; sample identification procedures from Hillsboro Elementary School District; and background information on identification, student records and confidentiality, and student characteristics. (JDD)

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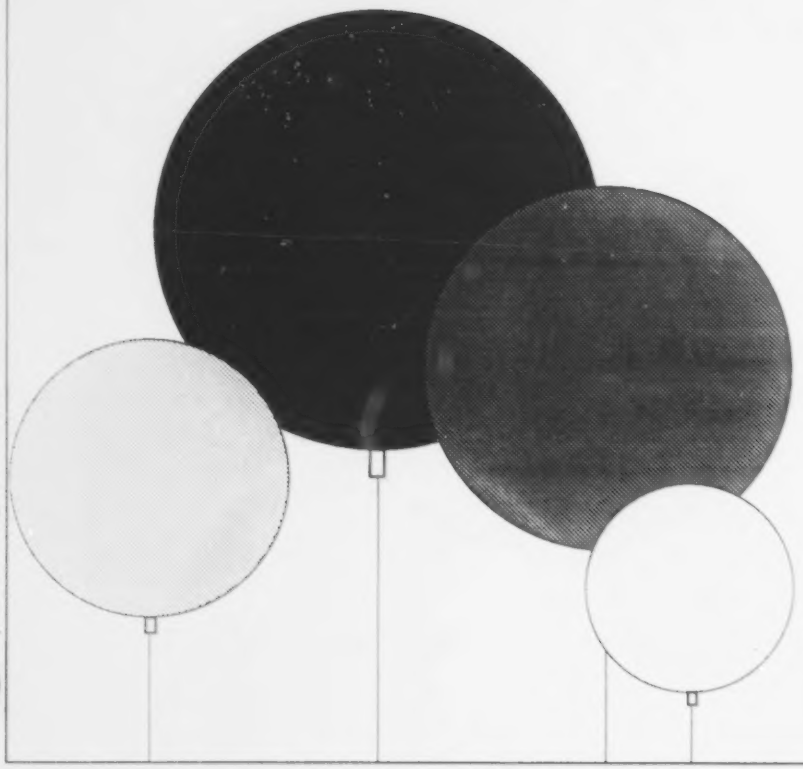
IDENTIFICATION

A Suggested Procedure for the Identification of Talented and Gifted Students K-12

July 1990



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IDENTIFICATION

A Suggested Procedure for
The Identification of Talented and Gifted Students K-12

Technical Assistance Paper 1

Part of a Series on OAR 581-22-403
and Related Oregon Laws and Rules

Revised July 1990

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INTRODUCTION

ORS 343.407 requires that gifted children in the State of Oregon shall be identified in the school year 1990-91. ORS 343.395(7) defines the gifted as "those children who require special educational programs or services, or both, beyond those normally provided by the regular school program." According to Oregon Administrative Rule (OAR) 581-22-403(1), "Each school district shall have local district policies and procedures for the identification of talented and gifted students ..." in the areas of intellectual ability and academic performance in grades K through 12. Subsections (a) and (b) further require that "(d)istricts shall collect behavioral, learning and/or performance information and include the information in all procedures for the identification of students. In addition to meeting the requirements of (1)(a), school districts shall use the following criteria for identifying the intellectually gifted and the academically talented:

> **Intellectually Gifted:** Those children who "score at or above the 97th percentile on a nationally standardized test of mental ability."
>
> **Academically Talented:** Those children who "score at or above the 97th percentile on one or more tests of academic achievement in a nationally standardized test battery" (the total reading and/or the total math scores are used).

OAR 581-22-403(1)(d) states that "districts may identify additional students who are talented and gifted as defined in ORS 343.395(7)(c),(d), and (e) as determined by local district policies and procedures." These are students who "demonstrate outstanding ability or potential in one or more of the following areas:"

* **Creative or Productive Ability** - "in using original or nontraditional methods in thinking and producing."
* **Visual or Performing Arts** - "such as dance, music, or art" as determined by professional judgment of student products or performances."
* **Talent in Leadership** - "ability in motivating the performance of others either in educational or noneducational settings," as determined by professional judgment based on student's demonstrated abilities, and may include peer judgment.

In addition, "(d)espite their failure to qualify under (1)(b)(A) or (B), districts, by local policies and procedures, may identify students who demonstrate the potential to perform at the 97th percentile." [581-22-403(1)(c)]. These may be gifted students from the following groups:

* Cultural and Ethnic Minorities
* Disadvantaged
* Underachieving Gifted
* Handicapped Learners

IDENTIFICATION PROCESS

Districts must develop an identification process which is carefully planned and incorporates information from several sources. It should be consistent with the district's philosophy and result in the identification of the type(s) of gifted student(s) the district plans to serve.

Any identification process should avoid three pitfalls in the combining of data:

Successive Hurdles

Avoid identification processes in which the child must first get a required score on one test in order to be considered at the next level. The use of multiple criteria is important; however, multiple criteria are not perfectly correlated with each other and some gifted children may be excluded.

Qualification by any Single Criteria

Avoid admitting anyone who qualifies on any single criteria rather than multiple indicators of giftedness. Look for patterns over time and for supporting information.

Weighted Matrix

Setting a weighted score (eg. 99% = 5, 98-97% = 4, etc.) on a variety of criteria may give too much emphasis to criteria of little significance. Instead, utilize a case study approach and analyze the information as a whole.

An identification process usually consists of several steps: referral, screening, testing and final selection/parent notification.

1. **Referral** - A process and procedure should be developed so that teachers, parents, peers and others have an opportunity to nominate potentially gifted and talented students to the screening pool.

2. **Initial Screening** - In developing this process, districts must be aware that "tests of intelligence, ability, achievement or aptitude shall not be used as sole criterion for placement of students in educational groups or tracks." OAR 581-21-030(2). Therefore, a systematic and comprehensive procedure for screening pertinent information including standardized test results and behavioral, learning and performance characteristics must be developed. There should also be a process for additional information gathering, including individual testing, if more data is necessary to make a decision.

3. **Further Testing** - Tests and measures must relate to the category of student being identified (intellectual and academic) and the instructional programs or services being planned. Methods for testing nontypical populations should be included in the overall procedure.

4. **Final Selection/Parent Notification** - Procedures, including rationale for the selection and forms for notifying parents, should be developed.

Any plan for identification must fit the definition of giftedness. Creativity or learning styles tests will not be appropriate for identification of high academic or intellectual ability, although they may provide useful information for assessment and programming purposes.

The Fit of Identification to Definition and Program

Parent Rights

Parents have rights regarding the testing and identification of their children. OAR 581-21-030(2)(a) requires that "(b)efore administering individual intelligence tests (as opposed to group intelligence tests) and all tests of personality to children in public schools, districts shall inform parents as to the purpose of testing; and the parent's written permission shall be obtained. In homes where the predominant language spoken is not English, the communication on the purpose of testing should be in the language spoken in the home." If the district is only testing selected students and not the total school population, this section must also be followed. Additionally, OAR 581-22-403(3) states "In carrying out the requirements of this rule, the school district shall inform parents of the identification of the child ..."

SAMPLE IDENTIFICATION PLAN: PROCESSES AND PROCEDURES

Prior to any identification effort, it is important to communicate with the community and develop and review the identification plan. Districts must decide what type of identification process they will use. Districts that use both achievement and mental ability testing already have two major identification pieces in place. However, districts that only have an achievement testing program in place may decide to screen the population to a smaller number before any further testing is done. If this is the case, the following issues should be considered:

- If a smaller population is tested, the process will be less expensive.
- Parent permission must be secured for any individually administered mental ability assessment and it is recommended for any mental ability assessment not involving the total school population.

However, if districts decide to add a mental ability measure to their testing program for the total school population, the following issues should be considered:

- It is more expensive to test larger population.
- Two major identification items are in place.
- Potential problems with parents and disappointed children are reduced since permission to test is needed from fewer parents.

Once the above choice is made, districts are ready to begin the actual process. The following identification plan can serve as a practical framework. An identification process needs to be both effective and efficient. This plan places referred students into three groups:

1. **Students who definitely meet identification criteria**
2. **Students who may meet identification criteria**
3. **Students who do not meet identification criteria**

The effort is put into looking at students who may meet the identification criteria. The four steps proposed are utilized in most identification procedures, but the focus here shall be on simplifying the process. Refer to the chart on the following page.

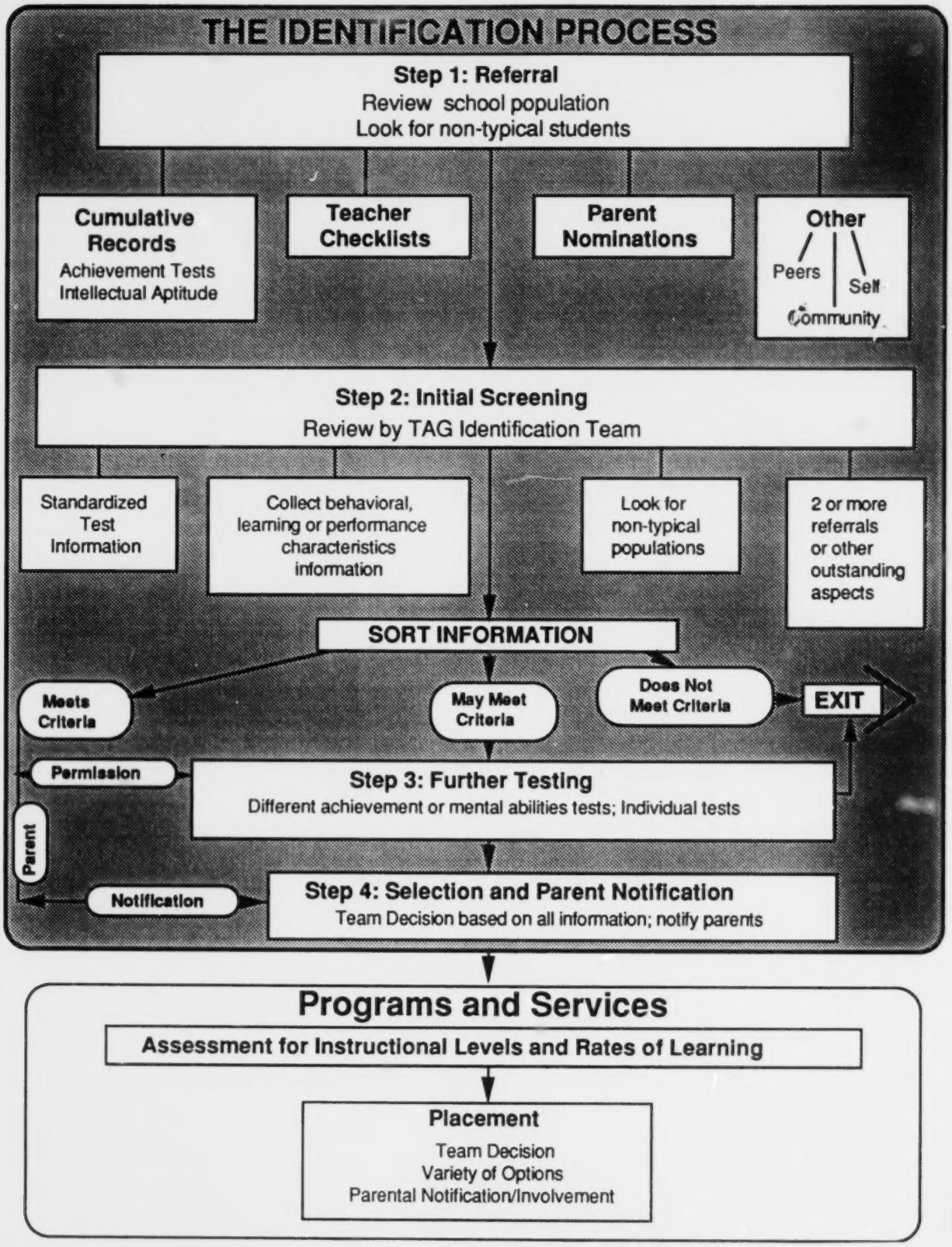
STEP 1: REFERRAL

Solicit referrals on children who may be eligible for TAG programs. This referral process should be used so that every child in the school district has equal access to the process. No testing of a portion of a school population should be done at this stage.

a. Screen cumulative and behavioral records to look for children with high national percentages in standardized achievement or mental abilities tests routinely given by the district. Look at total reading, total math and mental ability scores over time for consistently high results.

b. Set criteria at least one standard error of measurement below the 97th percentile for the standardized test(s) used. For most tests this will be about the 92nd percentile. Put all children with any scores above this point in the referral pool. Some of these children may be intellectually but not academically gifted, or academically gifted in only one area, though usually there is a moderate to strong correlation between intellectual and academic abilities.

c. Additional referral techniques include nominations from teachers, parents or other individuals. Publish a "Child Find" notice in newsletters and local newspapers to inform constituents that the district is looking for children who may qualify as talented and gifted (see appendix). Post notices in public places in the community such as school offices and community bulletin boards. Prior to referring children, teachers must receive training on the characteristics of gifted-


THE IDENTIFICATION PROCESS
Step 1: Referral
Review school population
Look for non-typical students
Cumulative Records
Achievement Tests
Intellectual Aptitude
Teacher Checklists
Parent Nominations
Other
Peers
Self
Community
Step 2: Initial Screening
Review by TAG Identification Team
Standardized Test Information
Collect behavioral, learning or performance characteristics information
Look for non-typical populations
2 or more referrals or other outstanding aspects
SORT INFORMATION
Meets Criteria
May Meet Criteria
Does Not Meet Criteria
EXIT
Permission
Parent
Step 3: Further Testing
Different achievement or mental abilities tests; Individual tests
Notification
Step 4: Selection and Parent Notification
Team Decision based on all information; notify parents
Programs and Services
Assessment for Instructional Levels and Rates of Learning
Placement
Team Decision
Variety of Options
Parental Notification/Involvement

referring children, teachers must receive training on the characteristics of giftedness in order to know what to look for in their classrooms. Joseph Platow's (1984) A Handbook for Identifying the Gifted/Talented provides several samples for referral instruments.

Be sure to use behavior, learning and performance characteristics in addition to test data. Additionally, all other children referred should be considered for the screening phase.

d. Look deliberately for students in the nontypical populations - cultural and ethnic minorities, disadvantaged, underachieving gifted and handicapped learners.

No additional costs are involved in this phase if the district has decided to utilize the testing program already in place. If the district adds additional tests for the total school population, costs can be reduced by sharing sets of tests with other districts or ESDs, or by purchasing only one set of tests per grade level and using machine scoreable or separate answer sheets and rotating the instrument throughout the district. Fees for scoring and test results vary according to test publisher.

STEP 2: INITIAL SCREENING

The screening process is used to select students who have been referred for further testing and evaluation. A school wide team consisting of at least two people (e.g.: TAG specialists, classroom teachers, measurement specialists, counselor, and the principal or designee) should be established to review all nominations. A team avoids problems that arise when a single person makes decisions about whether or not a child is gifted. In all cases, individuals who are knowledgeable about use and interpretation of test scores and/or giftedness should be selected. The team decision based on the professional judgment of qualified persons, not test scores, will avoid problems of rigidity, will meet needs of individual districts and children, and can be better defended in any potential complaint or appeals proceedings.

The confidentiality of the child's case study information must be maintained. The district must establish or utilize procedures for maintaining such behavioral records based on federal and state laws and Oregon Administrative Rules. **Any information collected for the identification process is behavioral and must be kept in a secure location and remain confidential.**

The following is an example of an initial screening process:

a. Collect available information on each referred child in a behavioral file, including standardized test scores, examples of student work, or other relevant information. The homeroom teacher and counselor may be sources of pertinent information.

b. Screen available test results data. Include subtest scores as well as total reading and math scores on standardized tests. Reading comprehension and mathematical problem solving scores may be useful indicators. Be aware of the standard error of measurement for each section of the test as well as how many items a student can miss and still receive a qualifying score. This information varies with each test and grade level. In some cases, a student must answer all items correctly to receive a score at the 99th percentile. If one question is missed, the score is at the 95th percentile.

c. Be sure to look for giftedness among nontypical populations. Many children are found in these groups if a careful search is made. Avoid penalizing such children for language difficulties. If the child is not native English speaking, the speed in which he or she moves through English as a Second Language (ESL) classes is a good clue since gifted children usually progress faster. Among these populations, the younger the child, the more likely that giftedness will be demonstrated.

d. If a child is nominated by two or more sources, or has other indicators of giftedness in his or her profile, particularly if the student's background is nontypical, further testing and evaluation are indicated.

e. Divide the screening pool into 3 groups:

Students definitely meeting identification criteria qualify by their standardized test scores, teacher nominations, student products, and other indicators. These children should be considered eligible for academically or intellectually gifted programs or services without further testing. However, if the district did not test the entire school population on both intelligence and achievement tests, the district may decide that the child should be tested to determine whether the other type of giftedness is evident. Parent permission may be necessary.

Students who may meet the identification criteria include children who have either qualifying scores or behavioral, learning or performance information indicating giftedness, but not both; students whose scores are within one or two percentiles of the 97th percentile; students with uneven case study profiles; and nontypical or special population students. These children may need further testing or additional learning, performance or behavioral information may need collecting.

Students who do not meet the identification criteria include children where the preponderance of the information indicates that the child does not meet eligibility requirements and does not show the potential to do so.

f. Screen in rather than out. If there is a question about a child's abilities and there is some strong indicator of giftedness although the child may not be producing, proceed with further testing or other forms of assessment. This child may be an underachiever or a poor test-taker. Be especially careful here if the child has a nontypical background. The student, through further testing and evaluation, may meet eligibility criteria.

STEP 3: FURTHER TESTING

Group mental ability tests, out-of-level or alternative achievement tests, or individual tests of mental ability may need to be administered. Achievement tests, most group mental ability tests, and some individually administered tests require careful reading of the manual, but do not require extensive training. Scores that are very uneven indicate testing using a different instrument to collect confirming data. In-depth information on specific instruments often used are included in the appendix. The following information is general and procedural.

Academically Talented

For the group of students who may meet the identification criteria, use standardized achievement tests different from those routinely given or use out of level testing (convert the results using the age norms or standard scale scores) in order to provide additional information on the student's achievement levels. Examples of instruments include:

* California Achievement Test - CAT (CTB/Macmillan/McGraw-Hill)
* Comprehensive Test of Basic Skills - CTBS (CTB/Macmillan/McGraw-Hill)
* Iowa Test of Basic Skills - ITBS (Riverside)
* Metropolitan Achievement Test - MAT (Psychological Corporation)
* Stanford Achievement Test - SAT (Psychological Corporation)
* Survey of Basic Skills - SBS (CTB/Macmillan/McGraw-Hill)

Intellectual Giftedness

Use tests of aptitude or mental ability to look for intellectual giftedness. These generally correlate highly with achievement tests and provide information for placement decisions, especially if abilities are not seen in class work. Before selecting which group measure to use, careful research is necessary (See the appendix for "Procedures for Selecting A Group Mental Ability Test"). Examples of instruments include:

* Academic Promise Test (Psychological Corporation)
* Cognitive Abilities Test - CogAT (Riverside)
* Differential Aptitude Test (Psychological Corporation)
* Otis-Lennon School Abilities Test (Psychological Corporation)
* Test of Cognitive Skills (CTB/Macmillan/McGraw-Hill)

Limitations of group mental ability tests include:

* Some aspects of intellectual ability cannot be measured within the confines of a multiple choice response.

* Reasoning cannot be observed on group administered paper-pencil tests.

* Bias may exist, in spite of test designers' efforts, against nontypical populations.

Efficiency of instruments in predicting giftedness depends on the characteristics of the group being tested. For example, the rate at which non-English speaking children learn English through ESL programs was next to California Achievement Test scores in predicting IQ on the WISC-R for Hispanic children in Philadelphia; peer nominations were more effective for third grade and up than for younger children. Any children with scores in the top 3% on any of these instruments should be recommended for TAG services followed by assessment of present education levels.

Individual Tests of Intelligence

Individual tests of intelligence given by skilled psychologists or psychometricians are superior to group tests, particularly when a child has a language disability, an adjustment problem, difficulty with a group administered test, or is very young. Borderline children, those who appear to be more able than tests indicate, or underachievers (discrepancies between intellectual ability and academic performance) should also be given individual tests. Some instruments include:

* Stanford-Binet Intelligence Scale
* WISC-R
* Kaufman Assessment Battery (K-ABC)
* Woodcock-Johnson Revised

Potential to Perform

By statute [ORS 343.395 (7)], districts may identify additional students "who demonstrate the potential to perform..." at the criteria levels described in OAR 581-22-403(1) but must adopt policies and procedures for their identification. This option should be considered carefully by districts for specific, nontypical talented and gifted students such as handicapped, disadvantaged, culturally and ethnically different, minority, bi-lingual/non-English speaking and other groups where traditional methods may cause problems with testing and information collection. The procedures districts adopt need to accommodate these issues and establish criteria and appropriate measures including objective tests.

Children who do not meet the 97th percentile criteria, but have other evidence suggesting the student has that capability, may be identified. The district must adopt policies

and procedures, with criteria, showing how the district determines the eligibility of these students.

Reevaluation

Any data on a child (behavioral or standardized testing) represents the current behavior and may or may not be representative of the child at a future point. A regularly scheduled reevaluation process, perhaps every three years, is recommended for the identification process. This is particularly important when identifying young children.

STEP 4: FINAL SELECTION AND PARENT NOTIFICATION

Matrices or case study forms can be useful as a worksheet during the screening process. However, the use of a cut-off score is not recommended. If a child has the required 97th percentile results or shows the potential to perform at that level, and has other information to support identification, then the child is identified regardless of any artificial "quota" or "cut-off" score on a matrix.

The identification decision is an important one. It should be based on the best judgment of a knowledgeable TAG identification team, not on an automatic review of test scores. If possible, include someone who knows a particular student on the team when considering students who may be questionable. Any team decisions must be based on multiple criteria; consequently, a single criterion or individual should not be responsible for keeping a child from being identified.

EVALUATION OF THE IDENTIFICATION PROCESS

In subsequent years, districts should evaluate the effectiveness of the overall identification process. Provisions for periodic reviews should be established. The following questions should be examined:

Referral:

* Does the process pick up additional students?
* Are the nomination forms eliciting necessary information?
* Do patrons know about the process and is it being utilized?
* Did all children have an opportunity to be nominated to the program?

Screening:

* Is the procedure comprehensive so that no single item is the determining factor?
* Does the process include enough helpful information?

Testing:

* Do the tests cover categories being identified?
* Are the tests locating students from nontypical populations?
* Are necessary permission forms from parents on file?

Final Selection and Parent Notification:

* Are talented and gifted students being selected?
* Are "successive hurdles," "any one criteria," and weighted matrices avoided?
* Are attempts made to identify students from nontypical populations?
* Are parents being notified of the identification of their child in a timely and efficient manner?

Evaluation:

* Have the instruments and procedures been evaluated as an effective way to identify gifted students?
* Is the sequence of data collection appropriate?
* Do board policies and procedures adequately address the identification process?

IDENTIFYING YOUNG GIFTED CHILDREN

If possible, identify children when very young. There is a clear dropping off of potential, especially among impoverished or culturally different populations, by the time children are in about third grade. If such children can be identified early and provided with appropriate support, their potential may be enhanced. Research has also shown that gifted children placed in special programs compared to those who remained in regular classes gained an average of two years as compared to one.

Use Multiple Criteria

Identifying young children as gifted, on the other hand, presents difficulties. Experts agree that case studies involving multiple criteria coupled with individually administered tests of intelligence are most appropriate, as heterogeneity characterizes young gifted children. Usually this involves parent nomination, teacher observation and formal testing. According to research, there is no such thing as a typical gifted child.

Identification System Requisites

Research indicates that any identification system for young gifted children must:

* Include opportunities for children with advanced abilities to display their skills. Typical school readiness tests may not have enough ceiling and alternative tests with greater ranges may be needed.

* Allow for the inconsistency that frequently characterizes young children's performance. Some aspects of tests are more likely to be interesting to a child. Look for what a child can do.

* Include a detailed parent report, such as a developmental history, in addition to what is collected via testing.

Problems in Identifying Young Gifted Children

Problems in identifying kindergarten and grade 1 gifted children include the following:

* Lack of appropriate group test information - many schools do not begin testing programs until grade 2.

* Less reliable test data - young children's scores on tests are less reliable predictors of giftedness than tests given in the later grades.

* Greater time is needed to test K-1 children because they should be tested in small groups. At the kindergarten level, a group of 3 to 5 children is recommended.

* Choice of instruments is more limited than for older children.

Examples of Instruments

* Cognitive Abilities Test (CogAT)
* Kaufman Assessment Battery (K-ABC)
* McCarthy Scale of Children's Abilities
* Peabody Individual Achievement Test (PIAT)
* Primary Test of Cognitive Skills (CTB/Macmillan/McGraw-Hill)
* Screening Test for Academic Readiness (STAR, Ahr, 1963)
* Stanford-Binet Intelligence Scale
* Wechsler Preschool and Primary Scale of Intelligence (WPPSI)
* Woodcock-Johnson Revised

Individual testing and careful observation is preferred for identifying young gifted children. The Seattle Project found "ample evidence that even the most comprehensive battery of tests, administered by the most skillful testers, may not provide a good estimate of a young child's capabilities" (Robinson, Roedell, and Jackson, 1979, p. 46).

Suggestions for Identification of Young Children

* Children tested for early admission who score in the 97th percentile or above on a nationally standardized test may be gifted. Additional information should be collected on these children.

* Often, districts screen each new kindergarten pupil. Any data collected could be useful. Children already reading or writing, or those with advanced mathematical concepts will likely need provision of special services or programs, regardless of their eligibility for the talented and gifted program. Although academic abilities are advanced, not all early readers, writers or mathematicians are found to be intellectually gifted. Children functioning two standard deviations above the mean or about two grade levels (less for very young children) should be considered for identification.

* Highly detailed drawings (for example, a kindergartner's portrait that includes eyelashes, pupils, fingernails, ears, and nostrils) often indicate high degrees of intelligence.

* Parent checklists that ask for descriptions of specific behaviors as examples of characteristics are better predictors of giftedness at the kindergarten level than teacher checklists. (See appendix for sample forms. Accommodations in the forms and procedures will be necessary for parents with limited English or for others who require alternative communication systems such as sign language.)

* Teacher checklists and observations are helpful if the teacher has had training on characteristics of gifted children. Teachers should look for greatly increased rate of learning after initial grasping of an idea or strategy than is demonstrated by most students.

* Individual mental ability test results may be helpful if other information is not sufficient and questions remain about a particular child.

* Go slowly and systematically over time, collect behavioral information through observations before formally identifying.

* Test in the last half of the kindergarten year if possible.

THE NONTYPICAL GIFTED

OAR 581-22-403 allows "...districts, by local policies and procedures, (to) identify students who demonstrate the potential to perform at the 97th percentile..." These may be students who are from nontypical populations such as cultural and ethnic minorities, economically disadvantaged, underachieving gifted or handicapped learners. As districts attempt to identify gifted students from these populations, the following should be kept in mind.

* Traditional tests and measurements used in initial referral and screening procedures for the identification of the gifted have been structured on normal, white, middle-class, English speaking experiences and value systems.

* Gifted students can be and have been identified in all areas of society, in all racial groups, and in all socioeconomic groups.

Traditional test and measurement results have been the most commonly used criteria in initial referral and screening procedures. Such a foundation for a selection process provides little allowance for students who fall into nontypical populations. Ample research exists that provides the justification for implementing an initial referral and screening system that would make it possible to identify students from these populations.

OBSTACLES TO IDENTIFICATION

Whitmore and Maker (1985) have provided an excellent description of the obstacles that appear to inhibit the identification of students from nontypical populations.

Obstacle 1: Stereotypic Expectations

When P.L. 94-142, The Education of All Handicapped Children Act, was implemented, it created a mind-set as to categories of handicapped students, including definitions, screening and identification procedures and educational programming. Giftedness would be overlooked because of the limited expectations of students who are labeled with nontypical conditions. As Whitmore and Maker (1985) have stated:

> With attempts to set reasonable expectations and to plan appropriate programs for exceptional children came new sets of stereotypic characteristics as the "norm" for each classification. A natural consequence, then, was a tendency on the part of the medical and educational professionals to prescribe treatments that limited the development of the child's abilities because of the expectancies

associated with the cluster of characteristics defining that labeled condition or syndrome. (p. 15)

This situation, coupled with the typical stereotype of the gifted student who is perceived as being a high achiever with motivation to excel, above average in all areas of development, and independent and self-directed, can easily cause the nontypical gifted to be overlooked.

Obstacle 2: Developmental Delays

Whitmore and Maker (1985) state that "cognitive development and intellectual performance are delayed when characteristics of the handicapping condition limit the child's ability to receive and respond to cognitive abilities through self-expression and problem solving." (p. 177) Because of both physical limitations and cultural and environmental conditions, a child with a disabling condition may not compare favorably with chronological age-mates on normed tests of "normality." Therefore, professionals should consider how a child is functioning in comparison with others who are also in the labeled group.

Obstacle 3: Incomplete Information About the Child

Because the primary label often determines the type of testing conducted, educators frequently do not obtain important information on family background, developmental histories or medical information. Also, in turn, those in a position to provide such information do not obtain educational information, preventing an all-inclusive understanding of an individual child's abilities and potential. As a result, the possibility of misdiagnosis and inappropriate educational programming is increased.

Obstacle 4: No Opportunity to Evidence Superior Mental Abilities

If nontypical gifted children suffer from stereotypic expectations, developmental delays, and incomplete information concerning their abilities, it is almost guaranteed they will not have many opportunities to demonstrate above average intelligence. Most educational programs designed to remediate the primary disabilities change goals and objectives. The emphasis is placed on the specific learning problems, basic skill development or social-emotional problems. Such programs rarely allow for the demonstration of creative and problem solving abilities, generalization skills, and the many other behaviors that signify "giftedness."

OVERCOMING THE OBSTACLES

Extra effort by school and community personnel is necessary if all the obstacles are to be overcome in identifying the various nontypical groups of gifted students. To help school districts, the following recommendations are made:

1. Keep in mind that "giftedness" is an individual matter and not always identifiable by test scores. Identification should be made by teachers and specialists who are either trained to recognize nontypical gifted children, or sensitive and knowledgeable of the less obvious identifying behaviors. Specific forms and methods should be developed for the population to be served.

2. In-service for teachers is necessary to overcome the standard or conventional concept of giftedness. Teachers need to be sensitized to the more unusual ways giftedness manifests itself.

3. Program administrators must be aware of the students in their district that might be considered a racial minority, culturally different, educationally or economically disadvantaged, underachieving or physically handicapped.

4. School districts should establish liaisons from the subgroups. These representatives can provide information as to value-systems, viewpoints and how giftedness is viewed from their standpoint.

5. Request referrals from many sources. The more varied the sources, the more likelihood that the nontypical gifted will not be overlooked.

CULTURALLY/ECONOMICALLY/EDUCATIONALLY DISADVANTAGED

A disproportionate number of young people in the culturally, economically and educationally disadvantaged populations are growing up in low-income environments. There is overwhelming evidence indicating that children in low-income families result in nontypical developmental patterns. The following have frequently been mentioned as contributing factors:

* Lower educational achievement of parents results in less support and encouragement to children in educational endeavors.

* Less access to intellectually stimulating educational materials and life experiences.

* Nutritional deficiencies.

* Linguistic deficiencies.

* Social isolation.

* Emphasis on cultural heritage.

* Ineffective parenting styles.

However, the following qualifiers must be considered:

* Many advantaged families retain cultural values that are different from the majority culture.

* Low income does not guarantee that one, or any combination of the above, will exist in a given family. Many low income families make great sacrifices to ensure that their children receive a good education and use excellent child rearing practices and provide adequate nutrition.

* There is as much diversity within this group as there is in the white middle class.

* It is always a mistake to apply indiscriminate stereotypical descriptions on any minority group.

Common Descriptors (Baldwin 1978):

* Outer locus of control rather than inner locus of control because tradition dictates strict adherence to directions

* Loyalty to peer group out of a need to belong

* Physical resiliency to hardships encountered in the environment

* Language rich in imagery and humor rich with symbolism; persuasive language because of a need to use subterfuge in environment to get message across

* Logical reasoning; planning ability and pragmatic problem solving ability as a result of early responsibility related to survival

* Creative ability developed out of need to use items of environment as substitute (e.g. dolls out of corn husks, balls out of tin cans, wagons out of packing boxes)

* Social intelligence and feeling of responsibility for the community; rebellious regarding inequities

* Sensitivity and alertness to movement developed as a result of family emphasis on physical prowess to substitute for lack of education

Exceptional Characteristics (Mecker 1977)

* Academic-retentive memory; ability to think systematically

* Psychosocial sense of humor; intuitive grasp of situations; understanding of compromise

* Creative - tolerance for ambiguities, insight; inventiveness; revclutionary ideas

* Creative fluency, flexibility, elaboration, originality

* Thinks in logical systems, uncluttered thinking, insightfulness, understanding cause and effect

* Flexibility of thinking, fluency, special aptitude in music, drama, creative writing

* Intuitive grasp of situations, sensitivity to right and wrong

* Hand-eye coordination, physical stamina, skilled body movements

UNDERACHIEVING GIFTED

Underachievement implies a significant discrepancy between potential and actual measured performance. It can exist in any of the areas of giftedness. Any one or more of the following characteristics may be indicators of underachievement.

Behavioral Characteristics (Whitmore 1980)

* School work consistently incomplete

* Vast gap between qualitative level of oral and written work

* Test phobic, poor test results

* Disinterest in attendance and participation in school

* Very low self-esteem and unhealthy self concept producing difficulties coping emotionally, lack of self-confidence, and inferiority feelings

* Sincere belief that they are not liked

* Lack of ability to function constructively in a group of any size

* Tendencies to continually set goals and standards too high

* No apparent satisfaction from repeated demonstration of acquired skills

* Not motivated by usual parent or teacher devices

* Lack of academic initiative (as defined by schools)
* Rigidity of interests
* Distractibility
* Hyperactivity
* Chronic inattentiveness
* Tendency to attribute success and failure to external locus of control
* Malingering and hypochondria

Students who demonstrate one of more of the characteristics may be overlooked as candidates for talented and gifted programs. Teachers and parents need to be informed of these characteristics in order to appropriately refer possible candidates for evaluation. Early identification of such behaviors is necessary in order to provide intervention and alleviate potential problems.

HANDICAPPED/DISABLED GIFTED

Description of Population (Whitmore and Maker 1985)

* Sensory disabilities - may have auditory or visual impairments
* Communication disabilities - may have learning disabilities or speech and language impairments
* Behavioral problems - may be emotionally disturbed
* Physical or health disabilities - may have orthopedic or health impairments that impair mobility, physical vitality or behavior
* Multiple and severe disabilities - may have combinations of impairments (deaf and blind, or severely emotionally disturbed and blind, or orthopedically impaired and language impaired)

Screening and Selection Procedures

Giftedness may be masked in this population making it very difficult to identify. The major obstacle in screening and selection procedures is that intelligence, achievement and aptitude tests designed to assess the abilities of "normal" populations must be

adapted for use with the disabled. Whitmore and Maker (1985) have provided several guidelines for the screening.

* Collect a variety of information regarding performance
* Collect information from a variety of sources
* Individuals collecting information should be knowledgeable about giftedness and specific disabilities
* Adapt checklist for specific population
* Compare performance with that of others with similar disability as well as those without disabilities
* Specific examples of characteristics should be elicited from teachers, parents and others
* Testing should be done by qualified professionals
* Testing situation and responses may need to be modified

IDENTIFICATION PROCEDURES FOR NONTYPICAL POPULATIONS

Identification procedures must include information from a variety of sources including observations of students in the classroom at play or in a test situation, teacher interviews, teacher and parent recommendations, work samples, cumulative records, trial performance in gifted programs, and culture sensitive tests. Measures which provide data include:

* Alpha Biographical Inventory
* Cattell Culture Fair Intelligence Series
* Columbia Mental Maturity Scale
* Goodenough-Harris Drawing Test
* Kaufmann Assessment Battery (K-ABC)
* PAPI (a Piagetian-based Assessment Pupil Instruction system)
* SOI-LA (Structure of the Intellect-Learning Abilities)
* Test of General Ability
* Wechsler Intelligence Scales for Children (performance scales)

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PROCEDURE FOR SELECTING A GROUP MENTAL ABILITY TEST

ORS 343.407 requires the identification of intellectually gifted and academically talented students K-12 by 1990-91. This article will discuss only the selection of a group mental ability test for use in the screening process for identifying intellectually gifted students. Many districts may not currently use a group mental measure and will find it necessary to select a mental ability test to assist in proper identification of these students. Achievement testing programs are in place in most districts and it is likely that those results will be included, as one piece of the process, when establishing the identification procedures.

The rules require that "school districts shall use the following criteria for identifying the intellectually gifted ...

A. Intellectually gifted students shall score at or above the 97th percentile on a nationally standardized test of mental ability" [OAR 581-22-403(1)(b)(A)].

Since intellectually gifted students are one of your targeted populations, the law requires that you use a test which measures mental ability.

Some assumptions have been made in writing this article:

Districts already have an achievement testing program in place;
Districts without TAG programs currently do not use a mental ability test;
Districts currently using a mental ability test may want to review their choice;
Individual mental ability or intelligence tests are preferred, but because of the expertise required and time and expense involved, most districts will not use them, except in a limited manner; therefore,
Districts will be looking for a group mental ability test that can be used in a screening process for identifying intellectually gifted students.

Based on the above assumptions, districts will need to do some research in order to determine which mental ability test to select. Before beginning this research, an understanding of the differences between achievement and intelligence tests is necessary. A well known leader in the measurement field, Dr. Anne Anastasi, explains this difference in an article entitled, "Mental Measurement: Some Emerging Trends" written for the preface of the 9th Mental Measurement Yearbook, edited by James V. Mitchell.

> ..."The unqualified term "intelligence" is thus too broad to designate available intelligence tests. These tests can be more precisely described as measures of academic intelligence or scholastic aptitude. They measure a kind of intelligent behavior that is both developed by formal schooling and required for progress within the academic system. ...It is now widely accepted that all cognitive tests measure *developed abilities,* which reflect the individual's learning history. Instruments traditionally labeled as aptitude tests assess learning that is broadly appli-

cable, relatively uncontrolled, and loosely specified...(A)chievement tests...assess learning that occurred under relatively controlled conditions...and each test covers a clearly defined and relatively narrow knowledge domain.

A second genuine difference between aptitude and achievement tests relates to their use; achievement tests are used primarily to assess current status, aptitude tests to predict future performance...by indicating to what extent the individual has acquired the prerequisite skills and knowledge for a designated criterion performance."

Source books for the research include Tests in Print (TIP) and Mental Measurement Yearbook (MMY) edited by Oscar Krisen Buros and more recently by James V. Mitchell. These books have extensive cross-referencing and the TIP III is a comprehensive index detailing the contents of all the MMYs. The tests are listed alphabetically in both books. Critical and fair reviews written by people not associated with the test publishers are included in the MMY. These reviewers were carefully chosen by the editors of the MMY to provide varying viewpoints. Articles are included in one or more MMY so check the review for additional sources. Reading several opinions provides a much better pool of information.

These volumes contain numbers which lead to the location/s of information about the particular test. An entry "9:1246" refers to test 1246 in the 9th MMY. The first number refers to the particular Yearbook (1-9) while the second number group refers to the test number. An entry like "T2:263" refers to test 263 in TIP II. Reading the "Introduction" at the beginning of these volumes will provide additional assistance.

The reviews are technical and require some study, but are helpful in making an informed decision. There are several things to look for in the information. The criteria for test selection are outlined below and are not listed in any particular order. The importance that is placed on any of the criteria will be determined by the person/ committee doing the selecting. Read the reviews from a critical and analytical viewpoint. There is no one test that is the best one. Some tests are better than others, and some are better for one situation than another. At least when the decision is made, there should be valid reasons for its choice and the limitations of the test should be known.

The worksheet accompanying this article is intended to help organize the information obtained from the reviews and/or the booklets from the test publisher. It is not intended to be used to provide a rating scale where the test with the most points is selected. The test selected will depend on which one best meets the district's needs.

As the reviews are read, look for the following items and record necessary information on the accompanying worksheet.

PURPOSE - What was the test designed to measure? Many group mental ability tests were designed to measure one's ability to achieve in school or to predict success in school. If you are looking for a measure of intelligence, you want some indication of how well children can think. Achievement test scores are already available. Many intellectually gifted students are achievers and score well on achievement tests, but some do not. You want to be able to pick up additional students from this test that might not have shown up on achievement scores.

WHAT DOES IT TEST? - Look to see what areas the subsets of the test measure. Does it measure verbal skills? Nonverbal? Reading? Memory? Higher thinking skills? It is helpful if it measures some different areas than the achievement test already being used.

GRADE LEVELS AVAILABLE - Check to see if there are levels available for the grades that will be tested. Not all publishers have levels designed to cover K-12.

READING LEVEL - The readability may be listed. It should not be too difficult for the population to be tested. Reading achievement scores are included on the achievement tests and should not be a major part of the mental score.

NORMING POPULATIONS - Look at how the norming populations were selected. A random selection is preferable, but should have included attention to the following: ethnic populations; a variety of socioeconomic levels; a representation from a variety of geographic areas; urban, as well as rural populations; and some representation from large and small schools. The larger the norming population the better. Some tests have been normed on small samples which may affect the reliability of the results. Small samples of under 1000 are suspect, especially if from one area of the country.

AGE OF NORMS - Some tests have been around a long time and have not been re-normed for many years. With the dramatic changes in our population over the past several years, norms that are quite old may not reflect results on the test if it were normed today.

CORRELATION TO IQ SCORE - Most standardized mental ability tests have been correlated to accepted individualized intelligence tests, such as the Stanford-Binet or the WISC-R. A high correlation of .80 or better is desirable. Also look for the correlation with achievement tests. Most often this will be high - also in the .80+ range. If the correlation to achievement tests is higher than the correlation to intelligence tests, then one must question whether the test is measuring anything unique to the intelligence construct. In general, the higher the

correlation to I.Q. and the lower the correlation to achievement, the more satisfactory the instrument will be in identifying talented and gifted students not found on achievement measures.

TEST CEILING - Some tests do not have high enough ceilings to identify gifted children. If you will be looking for children with IQs of 127+, then the ceiling should be high enough to allow for differentiating scores above that point. An alternative is to "out-of-level" test to increase the ceiling.

TYPES OF RESULTS AVAILABLE - Will the results produce a single Standard Score (I.Q.) or multiple scores? The law requires a single total score for identification purposes. A stanine? Stanines are too broad to be helpful in selection, but are easier to use for distribution. A percentile? Percentiles are familiar to parents and are the guidelines used in the OARs for selection. More than one type of score? A Standard Score may be helpful, but probably is not the score that should be distributed. It is helpful if there is more than one way to report the results.

SCORING OPTIONS - Does the publisher offer machine scoring services? Is it expensive relative to other options and how long is the wait for the results? If a small number of tests are to be given, are scoring keys available and easy to use?

NORMS TABLES - Norms tables should be available. It is helpful if they are by grade and by chronological age (CA). It may be necessary to out-of-level test some students in order to increase the ceiling and provide more accurate information on the child's strengths and weaknesses. Most publishers include some type of expanded scale score which allows the child's results to be compared to age/grade peers.

EASE OF ADMINISTERING - Look at the time requirements. Some require the test to be administered all in one setting and some recommend more than one setting. Also look at the test manual. The directions should be clear and easy to follow.

TEST/RE-TEST CORRELATIONS - The correlation between results of the same test given again should be high (.90+). High reliability of the results is necessary so that one can depend on similar results if the test had been given on any other day.

MULTIPLE FORMS AVAILABLE - Having the option of multiple forms is helpful if it is necessary to retest some children within a short amount of time. If there are multiple forms available, the correlation of the results from one form to another should be very high (.90+).

STANDARD ERROR OF MEASUREMENT - The standard error of measurement (SEM) for most tests is high. Just be aware of what it is so if there are questions in the identification process, room can be made to screen some students in if other information indicates the scores may not be indicative of the child's true ability. For example, if the SEM is 5, a child with a score of 92% may be able to perform at the 97%tile level. Because of the SEM, it is imperative that the selection process include multiple criteria.

COMMENTS BY THE REVIEWERS - Most reviewers will discuss the positive and negative aspects of the particular test. These comments may prove helpful in making the final decision on which test to select. Record excerpts on the worksheet - you may want to indicate if the comments are from one or more than one reviewer.

COST - Some consideration must be given to cost. Most tests are packaged with multiple copies of student books together with the test manual. Additional items, such as class record sheets, answer keys, publisher scoring options, answer sheets, and norming tables, may need to be purchased. The publishers will send a catalog detailing all options with prices. These vary with the test, but careful reading of the offerings and then discussion with the company or salesperson for your area will ensure that all necessary items are ordered and any questions are answered.

Once the research has been completed, additional questions might arise, but at least one is armed with the information to ask intelligent questions. In searching for the "best" group mental ability test, it was discovered that there really isn't one that has all of the "right" criteria. Districts may want to pilot the selected test to determine if the results seem satisfactory. To make sure districts are identifying most of the intellectually gifted students, administering an individual mental ability test would be the preferred choice. However, lacking funds and trained personnel, some districts must find an acceptable group mental ability test to use in the identification process. Knowing what the selected test is testing, knowing its limits, and using additional learning, behavioral and performance information will significantly increase the chance of identifying gifted children who need services.

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MENTAL ABILITY TEST SELECTION WORKSHEET

The district's purpose in selecting a mental ability test is _____

_____ Date_____

TEST: **PUBLISHER:**

PURPOSE OF PUBLISHER'S TEST

Test was designed to assess:

_____

_____

_____

_____

_____

_____

WHAT DOES IT TEST?

_____

_____

_____

_____

LEVELS AVAILABLE

Circle levels/grades available

Preschool K 1 2 3 4

5 6 7 8 9 10 11 12

NORMING POPULATION

Age of Norms: _____

Norms Group Size: _____

Circle Items Represented In Norming Population

Various Ethnic Pop.

Multiple Socioecon. Levels

Various Geographic Regions

Urban/Rural Areas Lg/Sm Schools

Random selection

CORRELATION TO IQ & ACHIEVEMENT TEST

Stanford-Binet: _____

WISC-R: _____

Name of Ach. Test/Corr.

_____ /

TEST CEILING

Highest Score: _____

RESULTS AVAILABLE

Standard Score(IQ): _____

Stanine: ___ %tile: ___

Other: _____

SCORING OPTIONS

Machine Scored:

Inhouse: Time Needed: _____

Cost: _____

Publisher: Time: _____

Cost: _____

Hand Scored:

Key Available? Yes/No

Time: _____

Cost: _____

NORM TABLES

Grade Level: Yes/No

Chronological Age: Yes/No

_____

Other:

EASE OF ADMIN.

Time Required? _____

Manual:

Easy to follow? Yes/No

Clear directions? Yes/No

Organized? Yes/No

TEST/RETEST CORRELATION

Correlation: _____

MULTIPLE FORMS

Available? Yes/No

All Levels? Yes/No

Correlation of forms? ___

STANDARD ERROR OF MEASUREMENT (SEM)

SEM _____

COST

_____ _____

#Tests/Pkg Price/Pkg

_____ _____

Manuals Record Sheets

_____ _____

Norm Tables Scoring Key

_____ _____

Ans. Sheets Sample Set

_____ _____

Other

REVIEWERS' COMMENTS: _____

RECOMMENDATION: _____

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ExCEL Update

West Union School District is looking for talented and gifted children who would benefit from instructional services designed for their unique needs. To qualify, a student must be individually evaluated by a team of professionals and found to be eligible. The law will require (1990-91 school year) that students who score at the 97th percentile on nationally standardized tests of academic achievement or mental ability and who have additional behavioral, learning or performance indicators be identified and provided programs and/or services by the 1991-92 school year. West Union is actively searching for these students. If you would like to refer your child for consideration, please call Charlene Balzer, ExCEL Coordinator, West Union School, 647-5356.

SAMPLE

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

PRIOR NOTICE AND PARENTAL CONSENT FOR EVALUATION
as required by Oregon Administrative Rule (OAR) 581-21-030(2)(a)

SAMPLE

Dear _____,

Your child,_____,is being considered for identification as intellectually gifted or academically talented under the requirements of OAR 581-22-403. These are children who are capable of performing at or above the 97th percentile on nationally standardized tests of mental ability or academic achievement and who have supporting behavioral, learning, or performance information. In your child's case, we currently have insufficient data on file and need the following additional information to assist us with this task. Oregon law requires that we receive your written consent before we proceed with testing. Please sign the attached permission form and return it as soon as possible.

___ Mental Ability Test - _____

___ Intelligence Test - _____

___ Academic Battery Score - ___ Reading ___ Math

_____

___ Parent Referral (form is attached)

___ Other _____

___ Additional factors which are relevant to the proposed testing: _____

_____

You will be informed of the results of all testing. You will also be notified of any identification of your child. Parents have rights regarding the identification, testing, and placement of students in programs and/or services. These rights as outlined in OAR 581-22-403(3) and 581-21-030(2)(a) are attached.

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West Union uses a case study approach for identification of students and a variety of information will be considered in the process. Programs/services will be adapted for identified students on an individual basis and parents will have an opportunity to participate in the selection of those programs/services. Students may be identified in either of two categories:

1. "ExCEL Students" - Children who perform at or above the 97th percentile on nationally standardized tests and have supporting behavioral, learning or performance information.

2. "Able Learners" - Children who perform at the 85th percentile and above on nationally standardized tests and have supporting behavioral, learning or performance information.

If you have any questions, please contact me at 647-5356.

Sincerely,

Charlene Balzer
ExCEL Coordinator

_____
Date

5/90

Education of Academically Talented and Intellectually Gifted Students

581-22-403 (1) Each school district shall have local district policies and procedures for the identification of talented and gifted students as defined in 343.395(7)(a) & (b). Students shall be identified beginning with the school year 1990-91.

(a) Districts shall collect behavioral, learning and/or performance information and include the information in all procedures for the identification of students.

(b) In addition to meeting the requirements of (1)(a), school districts shall use the following criteria for identifying the intellectually gifted and the academically talented:

(A) Intellectually gifted students shall score at or above the 97th percentile on a nationally standardized test of mental ability;

(B) Academically talented students shall score at or above the 97th percentile on one or more tests of academic achievement in a nationally standardized test battery. The tests in the battery used for the purposes of identification shall be limited to reading and mathematics.

(c) Despite their failure to qualify under (1)(b)(A) or (B), districts, by local policies and procedures, may identify students who demonstrate the potential to perform at the 97th percentile.

(d) Districts may identify additional students who are talented and gifted as defined in 343.395(7)(c), (d), and (e) as determined by local district policies and procedures.

(2) Identified students shall be served beginning with the school year 1991-92. Each school district shall have a written plan for programs and services, and all required written course statements shall identify the academic instructional programs and services which shall be provided. The instruction provided identified students shall address their assessed levels of learning and accelerated rates of learning.

(3) In carrying out the requirements of this rule, the school district shall inform parents of the identification of the child and the programs or services available. The district shall also provide an opportunity for the parents to participate in selecting the programs and services for their child.

(4) Districts may request an extension of time for implementing the programs and services required in Section 2 of this rule. Extensions may not be requested for purposes of student identification, as set forth in Section 1 of this rule.

(a) District requests for an extension for reasons of financial hardship shall be permitted and shall be submitted to the State Superintendent on forms provided by the Department of Education. Such requests shall be submitted between December 1 and July 1 of the year preceding the school year for which the extension is requested. All requests shall address the following factors but shall not be limited to them:

(A) The district's necessity to reduce programs and/or personnel for the school year beginning on July 1, 1990 in order to maintain required educational programs;

(B) The district's tax rate, audited per pupil expenditure and assessed value per pupil for the prior three years as compared to the state average of districts of like size and type for each of these factors;

(C) The district's unemployment rate in the prior three fiscal years, compared to the county/metropolitan service area average, as reported by the State of Oregon Employment Division; and

(D) The district's percentage of students participating in the free and reduced-fee school lunch programs during the prior three years as compared to the state average.

(b) The State Superintendent shall recommend action to the State Board of Education based on the data submitted by the requesting district.

(c) The State Board of Education may, upon review of the Superintendent's recommendations and data submitted by requesting districts, grant an extension of one year for reasons of financial hardship.

Stat. Auth.: ORS 343.407 and 343.409
Hist.: EB 15-1989, f. & cf. 4-19-89; EB 30-1990, f. & ef. 5-18-90

Limitation on Administration and Utilization of Tests in Public Schools

581-21-030 (1) Tests shall be considered as instruments that are means to assist decision-making on the part of parents, the public, school boards and the professional staff, rather than ends unto themselves. Tests may be used as follows in addition to other uses specified in local policies:

(a) To assist in making decisions about the effectiveness of school programs.

(b) To assist in determining the attainment of specified educational outcomes.

(c) To provide information to the students about themselves, to parents, and to the school staff which may assist them in making programmatic decisions of benefit to the student.

(2) Tests of intelligence, ability, achievement or aptitude shall not be used as sole criterion for placement of students in educational groups or tracks:

(a) Before administering individual intelligence tests (as opposed to group intelligence tests) and all tests of personality to children in public schools, districts shall inform parents as to the purpose of testing; and the parents' written permission shall be obtained. In homes where the predominant language spoken is not English, the communications on the purpose of testing should be in the language spoken in the home.

(b) When a school district believes it is not feasible to comply with subsection (2)(a) of this rule, it may petition the Department of Education for a waiver in accordance with the procedure contained in the State Standards for Oregon Public Schools.

Stat. Auth.: ORS Ch. 326 & 336
Hist.: 1EB 141, f. 10-5-72, ef. 10-15-72; 1EB 173, f. 7-1-74, ef. 9-1-74; 1EB 226, f. & ef. 6-4-76; 1EB 16-1982, f. 8-4-82, ef. 8-5-82

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

PERMISSION TO EVALUATE

SAMPLE

Test to be administered: _____

Other: _____

I understand and agree to the above described individual testing or other evaluation. I have received a copy of my rights and understand that the granting of consent is voluntary and may be revoked at any time. I also understand that consideration of my child does not guarantee a final identification as intellectually gifted or academically talented.

___ Permission form and/or
___ Parent Referral Form
must be returned in order for the evaluation process to continue.

Please return by _____.

___ Permission is given to conduct an evaluation.

___ Permission is denied to conduct an evaluation.

_____
Student's Name

_____ _____
Parent/Guardian Date

5/90

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

Dear _____,

Your child, _____, is being considered for the "Able Learner" portion of the ExCEL Program. These are children who are capable of performing at or above the 85th percentile on nationally standardized tests of intellectual ability or academic achievement and who have supporting behavioral, learning or performance information. In your child's case, we currently have insufficient data on file and would welcome some additional information to assist us with this decision. If you feel your child qualifies for this program, please fill out the enclosed Parent Referral Form and attach any additional comments of your choice.

West Union uses a case study approach for identification of students and a variety of information is considered. Programs and/or services may be adapted for "Able Learner" students if a need exists. You will be notified if it is determined that this designation is appropriate for your child.

Please return the Parent Referral Form by _____.
If you have any questions, please contact me at 647-5356.

Sincerely,

Charlene Balzer
ExCEL Coordinator

_____
Date

5/90

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WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

Dear _____,

West Union School District identifies talented and gifted students as required by Oregon Administrative Rule (OAR) 581-22-403. These are children who are capable of performing at or above the 97th percentile on nationally standardized tests of mental ability or academic achievement and who have supporting behavioral, learning or performance information. A case study approach for identification is used and a variety of information is considered in the process. It has been determined that your child, _____, qualifies for identification as:

__ Intellectually gifted

__ Academically talented in reading

__ Academically talented in math

This identification means that your child will receive programs and/or services at his/her instructional level and rate of learning [OAR 581-22-403(2)] which will be adapted on an individual basis. Parents will be sent a letter in the fall and offered an opportunity to participate in the selection of those services [OAR 581-22-403(3)] during September, 1990. Parental rights are included for your information.

In addition, this identification will be valid in any school district in Oregon. In the event you move, you will need to sign a form requesting West Union School District to release this behavioral information to another district.

The assessment of instructional level will begin as soon as possible. Identified students will be excused from class to complete tests in reading and/or math. The tests that fit with the adopted texts in these areas will be utilized to determine placement in the curriculum for next year. Additional academic tests may be necessary in order to collect accurate information.

If you have any questions, please contact me at West Union School, 647-5356.

Sincerely,

Charlene Balzer
ExCEL Coordinator

_____
Date

5/90

SAMPLE

Education of Academically Talented and Intellectually Gifted Students

581-22-403 (1) Each school district shall have local district policies and procedures for the identification of talented and gifted students as defined in 343.395(7)(a) & (b). Students shall be identified beginning with the school year 1990-91.

(a) Districts shall collect behavioral, learning and/or performance information and include the information in all procedures for the identification of students.

(b) In addition to meeting the requirements of (1)(a), school districts shall use the following criteria for identifying the intellectually gifted and the academically talented:

(A) Intellectually gifted students shall score at or above the 97th percentile on a nationally standardized test of mental ability;

(B) Academically talented students shall score at or above the 97th percentile on one or more tests of academic achievement in a nationally standardized test battery. The tests in the battery used for the purposes of identification shall be limited to reading and mathematics.

(c) Despite their failure to qualify under (1)(b)(A) or (B), districts, by local policies and procedures, may identify students who demonstrate the potential to perform at the 97th percentile.

(d) Districts may identify additional students who are talented and gifted as defined in 343.395(7)(c), (d), and (e) as determined by local district policies and procedures.

(2) Identified students shall be served beginning with the school year 1991-92. Each school district shall have a written plan for programs and services, and all required written course statements shall identify the academic instructional programs and services which shall be provided. The instruction provided identified students shall address their assessed levels of learning and accelerated rates of learning.

(3) In carrying out the requirements of this rule, the school district shall inform parents of the identification of the child and the programs or services available. The district shall also provide an opportunity for the parents to participate in selecting the programs and services for their child.

(4) Districts may request an extension of time for implementing the programs and services required in Section 2 of this rule. Extensions may not be requested for purposes of student identification, as set forth in Section 1 of this rule.

(a) District requests for an extension for reasons of financial hardship shall be permitted and shall be submitted to the State Superintendent on forms provided by the Department of Education. Such requests shall be submitted between December 1 and July 1 of the year preceding the school year for which the extension is requested. All requests shall address the following factors but shall not be limited to them:

(A) The district's necessity to reduce programs and/or personnel for the school year beginning on July 1, 1990 in order to maintain required educational programs;

(B) The district's tax rate, audited per pupil expenditure and assessed value per pupil for the prior three years as compared to the state average of districts of like size and type for each of these factors;

(C) The district's unemployment rate in the prior three fiscal years, compared to the county/metropolitan service area average, as reported by the State of Oregon Employment Division; and

(D) The district's percentage of students participating in the free and reduced-fee school lunch programs during the prior three years as compared to the state average.

(b) The State Superintendent shall recommend action to the State Board of Education based on the data submitted by the requesting district.

(c) The State Board of Education may, upon review of the Superintendent's recommendations and data submitted by requesting districts, grant an extension of one year for reasons of financial hardship.

Stat. Auth.: ORS 343.407 and 343.409
Hist.: EB 15-1989, f. & cf. 4-19-89; EB 30-1990, f. & cf. 5-18-90

STUDENT RECORDS

336.185 Definitions for ORS 336.185 to 336.215. For purposes of ORS 336.185 to 336.215, the following definitions will apply:

(1) "Student records" include all records relating to students maintained by any elementary, secondary school or education service district.

(2) "Student behavioral records" are student records which include psychological tests, personality evaluations, records of conversations and any written transcript of incidents relating specifically to student behavior.

(3) "Student progress records" are student records which include transcripts of grades and courses taken, records of attendance, tests relating specifically to achievement or measurement of ability, and records of health.

(4) "Superintendent" means the highest ranking administrative officer in a school district or an educational institution, or in the absence of the superintendent, the person designated to fulfill the functions.

(5) "Board" means the board of directors of a school district or other educational institution. [1971 c.512 §1; 1979 c.274 §1; 1981 c.892 §93]

336.190 [Repealed by 1955 c.290 §1]

Guidelines from Student Records, an Oregon Department of Education 1989 publication.

10.0 Transfer of Behavioral Records

10.1 Oregon Revised Statutes do not provide for the release of student behavioral records to other institutions without written parental permission and must be released in the presence of the person qualified to interpret the records.

10.2 A parent may request a copy of the student behavioral record. It must be interpreted when furnished to the parent. The parent may release his/her copy of the record to another institution or party.

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/648-4400

RELEASE OF INFORMATION FORM

Student's Name _____ Grade _____

DOB: _____ School/County _____

I hereby authorize _____ to release copies of

confidential information concerning _____

To _____ By _____

_____

Signature of Parent/Guardian Date

SAMPLE

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

Dear _____,

The ExCEL Program has been established to serve the needs of identified talented and gifted students. The program has also made a commitment to serve additional students who have been identified as "Able Learners." These are children who are capable of performing at or above the 85th percentile on nationally standardized tests of mental ability or academic achievement AND who have supporting behavioral, learning or performance information. A case study approach is used and a variety of information is considered in the process. It has been determined that your child, _____, qualifies as an:

__ Intellectual Able Learner

__ Able Learner in reading

__ Able Learner in math

SAMPLE

This identification as an "Able Learner" means that your child may need to have adjustments in programs and/or services to reflect his/her instructional level. Programs and/or services may be adapted on an individual basis and parents may request an opportunity to participate in the selection of those services during September/October 1990.

The assessment of instructional level will begin as soon as possible. Students may be excused from class to complete tests in reading and/or math. The tests that fit with the adopted texts in these areas will be utilized to determine placement in the curriculum for next year.

If you have any questions, please contact me at West Union School, 647-5356.

Sincerely,

Charlene Balzer
ExCEL Coordinator

_____
Date

5/90

WEST UNION SCHOOL DISTRICT NO. 1

DISTRICT OFFICE
ROUTE 5 BOX 230 HILLSBORO OR 97124
503/647-5356

WEST UNION ELEMENTARY
503/647-5356

LENOX ELEMENTARY
503/645-4400

Dear _____,

Your child, _____, is being considered for the ExCEL Program. These are children who are capable of performing at or above the 97th percentile on nationally standardized tests of intellectual ability or academic achievement and who have supporting behavioral, learning or performance information. In your child's case, we currently have insufficient data on file and would welcome some additional information to assist us with this decision. If you feel your child qualifies for this program, please fill out the enclosed Parent Referral Form and attach any additional comments of your choice.

West Union uses a case study approach for identification of students and a variety of information is considered. Programs and/or services will be adapted for "ExCEL" students if a need exists. You will be notified if it is determined that this designation is appropriate for your child.

Please return the Parent Referral Form by _____.
If you have any questions, please contact me at 647-5356.

Sincerely,

Charlene Balzer
ExCEL Coordinator

_____
Date

5/90

SAMPLE

WEST UNION SCHOOL DISTRICT
ExCEL PROGRAM
IDENTIFICATION AND ASSESSMENT TEAM REPORT

Name:_____ D.O.B._____ Age/Gr.____

Parent(s) _____ Phone(w) _____
(h) _____

Address _____

****

IDENTIFICATION

Case study information has been reviewed by the Identification and Assessment Team. It has been determined that this student:

I. qualifies under Oregon State guidelines as

___ Intellectually Gifted ___ Academically Talented in Reading

___ Academically Talented in Math

Comments: _____

_____

_____

II. qualifies under West Union School District procedures as an

___ Intellectual Able Learner ___ Able Learner in Reading

___ Able Learner in Math

Comments: _____

_____

_____

III. ___ will be best served by the regular program.

Comments: _____

_____

_____

Committee Member/Title Date

_____

_____

_____

_____

SAMPLE

ASSESSMENT

As a result of the identification, this student has been assessed in:

__ Reading __ Math __ Social Studies __ Science __ Other _____

Assessment Instruments **Results**

Subjects to be Modified **Recommended Instructional Level**

Areas Needing Special Attention **Comments**

Charlene Balzer 5/90

ExCEL IDENTIFICATION CASE STUDY FORM

WEST UNION SCHOOL DISTRICT Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

Student's Name School Date/Grade /Teacher D/Gr /T D/Gr /T D/Gr /T D/Gr /T D/Gr /T D/Gr /T

TEST DATA		% tile Score Kdgn. 19___	First 19___	Second 19___	Third 19___	Fourth 19___	Fifth 19___	Sixth 19___
MENTAL ABILITY RESULTS:								
CogAT	V							
	Q							
	NV							
	Composite							
EAS / Other								
SBS ACHIEVEMENT RESULTS:								
Reading Comp./R. Total		/	/	/	/	/	/	/
Conc. or Prob. Solv./Math Total		/	/	/	/	/	/	/
Social Studies								
Science								
Composite								
_____								
PERFORMANCE DATA:								
Reading								
Math								
Social Studies								
Science								

Information indicates the student exhibits ( ) gifted characteristics.

ANECDOTAL DATA:	(1) very few 1-3	(2) some 4-6	(3) several 7-10	(4) many 11+			
Teacher Referral							
Parent Referral							
Peer Referral							
Self Referral							
Product Review							
Interview							

SAMPLE

Assessment team recommends: ___Regular classroom placement ___Modifications in programs/services as attached

I have met with the ExCEL Coordinator and have had an opportunity to participate in selecting programs/services for my child.

Parent's Signature _____ Date _____

Coordinator's Signature _____ Date _____

Parent's Initials/ Date Yr. 2 _____ 3 _____ 4 _____ 5 _____ 6 _____ 7 _____

Coordinator's Initials/ Date Yr. 2 _____ 3 _____ 4 _____ 5 _____ 6 _____ 7 _____

Developed by Charlene Balzer, ExCEL Coordinator 1990

ExCEL SCREENING FORM - WEST UNION SCHOOL DISTRICT

Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

Please list all students who are described by the following statements. You may list the same student more than once and more than one child may be listed in each box.

Teacher's Name _____ School/Grade _____ Date _____

Which students, when compared to others of the same age,

1. are exceptionally able to retrieve information from both short and long term memory.	7. ask questions which are unusual, insightful and/or show relationships to other experiences.
2. exhibit a variety of learning strategies and are able to adapt the learning approach appropriately.	8. use appropriate and original examples and/or are able to produce unusual analogies to illustrate points.
3. are unusually adept at connecting new learning to previously learned material to make it meaningful.	9. demonstrate a high level of understanding through concise or elaborate words or products; are able to translate verbal information into visual representations (charts, graphs, illustrations).
4. exhibit exceptional ability in detecting relationships, similarities and differences.	10. exhibit special skills unusual for age. Give examples from school or home.
5. are able to process information quickly.	11. exhibit innovative use of common materials by adapting or combining them in a new or unusual way.
6. demonstrate a much wider range of vocabulary useage, are more precise in the use of words and use complex sentence structure.	12. have collections or hobbies that are unusual or are organized in a sophisticated or original manner.

SAMPLE

Which students, when compared to others of the same age,

13. a. have the ability to devise or adopt a systematic strategy for solving problems. b. are able to change or adapt the problem solving strategy in some way if the original approach is not working.	18. exhibit the ability to evaluate his/her own solutions to problems and his/her own performance objectively and realistically. 19. become impatient and overly critical if work is not perfect.
14. a. exhibit a wide range of knowledge. b. exhibit a depth of information in one or more specific areas.	20. prefer to work on projects that provide a challenge. 21. exhibit concern about social or political problems unusual for others; are concerned about right and wrong.
15. a. exhibit persistence on uncompleted tasks, often finding it difficult to leave until some closure is reached. b. complete only part of an assignment or project and then take off in a new direction.	22. exhibit a zany sense of humor; enjoy the use of puns. 23. are resistant to drill on repetitive tasks such as math facts, spelling or handwriting.
16. become absorbed in intellectual tasks and seem highly resistant to distractions.	24. can produce "reasons" which may be elaborate and/or highly creative for not doing things in the way originally presented.
17. exhibit intense and purposeful exploratory behavior.	25. like to organize or bring structure to things and/or people.

SAMPLE

Information Source: Dr. Elizabeth Hagen, Identification of the Gifted, 1980.
Developed for the West Union School District by Charlene Balzer, ExCEL Coordinator.
Edited by Sandy Howell, TAG Specialist, Washington County ESD. 1990.

TEACHER REFERRAL FORM - ExCEL PROGRAM

WEST UNION SCHOOL DISTRICT Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

Student's Name _____ **School/Grade** _____

Teacher's Name _____ **Date** _____

Please check any of the following items which you most closely identify with the student.
The student, when compared to others of the same age,

____ 1. is exceptionally able to retrieve information from both short and long term memory.
____ 2. exhibits a variety of learning strategies and is able to adapt the learning approach appropriately.
____ 3. is unusually adept at connecting new learning to previously learned material to make it meaningful.
____ 4. exhibits exceptional ability in detecting relationships, similarities and differences.
____ 5. is able to process information quickly.
____ 6. demonstrates a much wider range of vocabulary useage, is more precise in the use of words and uses complex sentence structure.
____ 7. asks questions which are unusual, insightful and/or show relationships to other experiences.
____ 8. uses appropriate and original examples and/or is able to produce unusual analogies to illustrate points.
____ 9. demonstrates a high level of understanding through concise or elaborate words or products; is able to translate verbal information into visual representations (charts, graphs, illustrations).
____ 10. exhibits special skills unusual for age.
____ 11. exhibits innovative use of common materials by adapting or combining them in a new or unusual way.
____ 12. has collections or hobbies that are unusual or are organized in a sophisticated or original manner.
____ 13. a. has the ability to devise or adopt a systematic strategy for solving problems.
____ b. is able to change or adapt the problem solving strategy in some way if the original approach is not working.
____ 14. a. exhibits a wide range of knowledge.
____ b. exhibits a depth of information in one or more specific areas.
____ 15. a. exhibits persistence on topics of interest, often finding it difficult to leave until some closure is reached.
____ b. completes only part of an assignment or project and then takes off in a new direction.
____ 16. becomes absorbed in intellectual tasks and seems highly resistant to distractions when focused on a topic of interest.
____ 17. exhibits intense and purposeful exploratory behavior on topics of interest.
____ 18. exhibits the ability to evaluate his/her own solutions to problems and his/her own performance objectively and realistically.
____ 19. becomes impatient and overly critical if work is not perfect.
____ 20. prefers to work on projects that provide a challenge.
____ 21. exhibits concern about social or political problems unusual for others; is concerned about right and wrong.
____ 22. exhibits a zany sense of humor; enjoys word play and the use of puns.
____ 23. is resistant to the routine drill on repetitive tasks covering information already known, such as math facts, spelling or handwriting.
____ 24. can produce "reasons" which may be elaborate and/or highly creative for not doing things in the way originally presented.
____ 25. likes to organize or bring structure to things and/or people.

What special intellectual and/or academic strengths suggest that the student may need programs or services outside of the regular program? Please elaborate. _____

_____

_____

In which, if any, academic areas does the student's performance seem to be well below his/her ability? Please elaborate.

_____

_____

After completing the rest of the form, please attach any additional information concerning the student that you feel will be helpful. Thank you for your assistance.

SAMPLE

TEACHER REFERRAL FORM - ExCEL PROGRAM
WEST UNION SCHOOL DISTRICT

Please refer to the checklist already completed and provide brief, specific examples for each of the appropriate behaviors for the student you are referring. The student may exhibit only a few of the 25 behaviors described. You may ask other adults who work with this student to provide examples.

Student's Name _____ **Teacher** _____ **School/Grade** _____

Date _____

The student, when compared to others of the same age,

1. is exceptionally able to retrieve information from both short and long term memory.	7. asks questions which are unusual, insightful and/or show relationships to other experiences.
2. exhibits a variety of learning strategies and is able to adapt the learning approach appropriately.	8. uses appropriate and original examples and/or is able to produce unusual analogies to illustrate points.
3. is unusually adept at connecting new learning to previously learned material to make it meaningful.	9. demonstrates a high level of understanding through concise or elaborate words or products; is able to translate verbal information into visual representations (charts, graphs, illustrations).
4. exhibits exceptional ability in detecting relationships, similarities and differences.	10. exhibits special skills unusual for age. Give examples from school or home.
5. is able to process information quickly.	11. exhibits innovative use of common materials by adapting or combining them in a new or unusual way.
6. demonstrates a much wider range of vocabulary useage, is more precise in the use of words and uses complex sentence structure.	12. has collections or hobbies that are unusual or are organized in a sophisticated or original manner.

SAMPLE

The student, when compared to others of the same age,

13. a. has the ability to devise or adopt a systematic strategy for solving problems. _____ b. is able to change or adapt the problem solving strategy in some way if the original approach is not working.	18. exhibits the ability to evaluate his/her own solutions to problems and his/her own performance objectively and realistically. 19. becomes impatient and overly critical if work is not perfect.
14. a. exhibits a wide range of knowledge. _____ b. exhibits a depth of information in one or more specific areas.	20. prefers to work on projects that provide a challenge. 21. exhibits concern about social or political problems unusual for others; is concerned about right and wrong.
15. a. exhibits persistence on topics of interest, often finding it difficult to leave until some closure is reached. _____ b. completes only part of an assignment or project and then takes off in a new direction.	22. exhibits a zany sense of humor; enjoys word play and the use of puns. 23. is resistant to the routine drill on repetitive tasks covering information already known, such as math facts, spelling or handwriting.
16. becomes absorbed in intellectual tasks and seems highly resistant to distractions when focused on a topic of interest. 17. exhibits intense and purposeful exploratory behavior on topics of interest.	24. can produce "reasons" which may be elaborate and/or highly creative for not doing things in the way originally presented. 25. likes to organize or bring structure to things and/or people.

Information Source: Dr. Elizabeth Hagen, Identification of the Gifted, 1980.
Developed for the West Union School District by Charlene Balzer, ExCEL Coordinator.
Edited by Sandy Howell, TAG Specialist, Washington County ESD. 1990.

PARENT REFERRAL FORM - ExCEL PROGRAM

WEST UNION SCHOOL DISTRICT Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

Child's Name _____ **School/Grade** _____ **Date** _____

Parent's Name _____ **Daytime Phone** _____

Please check any of the following items which you most closely identify with your child.
Your child, when compared to others of the same age,

____ 1. is exceptionally able to retrieve information from both short and long term memory.
____ 2. exhibits a variety of learning strategies and is able to adapt the learning approach appropriately.
____ 3. is unusually adept at connecting new learning to previously learned material to make it meaningful.
____ 4. exhibits exceptional ability in detecting relationships, similarities and differences.
____ 5. is able to process information quickly.
____ 6. demonstrates a much wider range of vocabulary useage, is more precise in the use of words and uses complex sentence structure.
____ 7. asks questions which are unusual, insightful and/or show relationships to other experiences.
____ 8. uses appropriate and original examples and/or is able to produce unusual analogies to illustrate points.
____ 9. demonstrates a high level of understanding through concise or elaborate words or products; is able to translate verbal information into visual representations (charts, graphs, illustrations).
____ 10. exhibits special skills unusual for age.
____ 11. exhibits innovative use of common materials by adapting or combining them in a new or unusual way.
____ 12. has collections or hobbies that are unusual or are organized in a sophisticated or original manner.
____ 13. a. has the ability to devise or adopt a systematic strategy for solving problems.
____ b. is able to change or adapt the problem solving strategy in some way if the original approach is not working.
____ 14. a. exhibits a wide range of knowledge.
____ b. exhibits a depth of information in one or more specific areas.
____ 15. a. exhibits persistence on topics of interest, often finding it difficult to leave until some closure is reached.
____ b. completes only part of an assignment or project and then takes off in a new direction.
____ 16. becomes absorbed in intellectual tasks and seems highly resistant to distractions when focused on a topic of interest.
____ 17. exhibits intense and purposeful exploratory behavior on topics of interest.
____ 18. exhibits the ability to evaluate his/her own solutions to problems and his/her own performance objectively and realistically.
____ 19. becomes impatient and overly critical if work is not perfect.
____ 20. prefers to work on projects that provide a challenge.
____ 21. exhibits concern about social or political problems unusual for others; is concerned about right and wrong.
____ 22. exhibits a zany sense of humor; enjoys word play and the use of puns.
____ 23. is resistant to the routine drill on repetitive tasks covering information already known, such as math facts, spelling or handwriting.
____ 24. can produce "reasons" which may be elaborate and/or highly creative for not doing things in the way originally presented.
____ 25. likes to organize or bring structure to things and/or people.

What special intellectual and/or academic strengths suggest that your child may need programs or services outside of the regular program? Please elaborate. _____

_____

_____

In which, if any, academic areas does your child's performance seem to be well below his/her ability? Please elaborate.

_____

_____

After completing the rest of the form, please attach any additional information concerning your child that you feel will be helpful. Thank you for your assistance.

SAMPLE

PARENT REFERRAL FORM - ExCEL PROGRAM

WEST UNION SCHOOL DISTRICT

Please refer to the checklist already completed and provide brief, specific examples for each of the appropriate behaviors for your child. Your child may exhibit only a few of the 25 behaviors described. You may ask other adults who know this child well to provide examples.

Child's Name _____ School/Grade _____

Your child, when compared to others of the same age,

1. is exceptionally able to retrieve information from both short and long term memory.	7. asks questions which are unusual, insightful and/or show relationships to other experiences.
2. exhibits a variety of learning strategies and is able to adapt the learning approach appropriately.	8. uses appropriate and original examples and/or is able to produce unusual analogies to illustrate points.
3. is unusually adept at connecting new learning to previously learned material to make it meaningful.	9. demonstrates a high level of understanding through concise or elaborate words or products; is able to translate verbal information into visual representations (charts, graphs, illustrations).
4. exhibits exceptional ability in detecting relationships, similarities and differences.	10. exhibits special skills unusual for age. Give examples from school or home.
5. is able to process information quickly.	11. exhibits innovative use of common materials by adapting or combining them in a new or unusual way.
6. demonstrates a much wider range of vocabulary useage, is more precise in the use of words and uses complex sentence structure.	12. has collections or hobbies that are unusual or are organized in a sophisticated or original manner.

SAMPLE

Your child, when compared to others of the same age,

13. a. has the ability to devise or adopt a systematic strategy for solving problems. _____ b. is able to change or adapt the problem solving strategy in some way if the original approach is not working.	18. exhibits the ability to evaluate his/her own solutions to problems and his/her own performance objectively and realistically. 19. becomes impatient and overly critical if work is not perfect.
14. a. exhibits a wide range of knowledge. _____ b. exhibits a depth of information in one or more specific areas.	20. prefers to work on projects that provide a challenge. 21. exhibits concern about social or political problems unusual for others; is concerned about right and wrong.
15. a. exhibits persistence on topics of interest, often finding it difficult to leave until some closure is reached. _____ b. completes only part of an assignment or project and then takes off in a new direction.	22. exhibits a zany sense of humor; enjoys word play and the use of puns. 23. is resistant to the routine drill on repetitive tasks covering information already known, such as math facts, spelling or handwriting.
16. becomes absorbed in intellectual tasks and seems highly resistant to distractions when focused on a topic of interest. 17. exhibits intense and purposeful exploratory behavior on topics of interest.	24. can produce "reasons" which may be elaborate and/or highly creative for not doing things in the way originally presented. 25. likes to organize or bring structure to things and/or people.

Information Source: Dr. Elizabeth Hagen, Identification of the Gifted, 1980.
Developed for the West Union School District by Charlene Balzer, ExCEL Coordinator.
Edited by Sandy Howell, TAG Specialist, Washington County ESD. 1990.

SELF REFERRAL FORM
WEST UNION SCHOOL DISTRICT

Read each of the statements below. Think about yourself. Write a brief comment by the statements which sound like you. The comment should explain how the statement is like you. If you need more room, you may use the back of the paper. Leave the statements blank if they do not sound like you.

1. I am able to use information I already know to help with new things. _____

2. I am able to explain how things are alike or different. _____

   _____

3. I seem to learn new things quickly. _____

4. I use words more like an adult. _____

5. I have been told that I ask interesting or unusual questions. The last time someone said that I had asked about _____

6. I am able to explain things using examples. _____

7. I am able to do something that very few others my age can do. As an example, I can _____

8. I can put things that usually do not go with each other together to make something new or unusual. One time I used _____ to make _____

9. I like to collect unusual things or I organize my collections in unusual ways. One thing I collect is _____

10. I seem to be able to figure out answers to problems that come up in the classroom or on the playground when no one else can. One time I figured out _____

11. a. I know a lot about many things. For example, I know about _____

    _____

    b. I know a lot about one or two things. For example, I know about

    _____

12. a. I get interested in a project and like to finish it before moving on.

    _____

    b. I often do not finish one project before I start a different one.

    _____

SAMPLE

13. I do not like to be interrupted when working on something interesting, especially when I am working on _____

14. a. I could help another student with a math problem. _____

b. I like to design and complete science projects. One project that I am proud of is _____

c. I read a lot of books. I especially read a lot about _____

d. I always seem to know the answers in math. _____

e. I like to work on social studies projects. One project I did was about _____

f. I have been told that my reports or projects are very good. One that I am proud of is _____

15. I have been told that my ideas are interesting and/or unusual. One interesting or unusual idea I had recently was _____

_____

16. I like my work to be perfect. _____

17. I like projects that make me think or provide a challenge. One project like that was _____

18. I care about other people's feelings and like things to be fair. For example, it makes me unhappy if _____

19. I like to make up and tell jokes or puns. My favorite joke or pun is _____

20. I do not like to practice on math facts or spelling words that I already know. _____

21. I like to write or tell interesting stories. I can show you a story I wrote about _____

22. I like to find new and different things to do. _____

Developed by Charlene Balzer, ExCEL Coordinator 1990
West Union School District
Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

PEER SURVEY
WEST UNION SCHOOL DISTRICT

Think about students in your grade who are best described by the following statements. You may list the same student more than one time and you can list more than one student for an item.

List the student (including yourself) in your grade who:

1. is able to use information s/he already knows to help when learning something new. _____

2. is able to explain how things are alike or different. _____

3. always seems to learn new things quickly. _____

4. uses words more like an adult. _____

5. asks the most interesting or unusual questions. _____

6. is able to explain things using examples. _____

7. is able to do something that very few other children your age can do. _____ This student can _____

   _____

8. can put things together to make something new or unusual. _____

9. likes to collect unusual things or organize collections in unusual ways.

   _____

10. seems to be able to figure out answers to problems that come up in the classroom or on the playground when no one else can. _____

11. a. knows a lot about many things. _____

    b. knows a lot about one or two things. _____

12. a. gets interested in a project and likes to finish it before moving on.

    _____

    b. does not finish one project before starting a different one.

    _____

13. does not like to be interrupted when working on something interesting.

    _____

SAMPLE

14. a. could help with a math problem. _____

    b. could help design and complete a science project. _____

    c. reads a lot of books. _____

    d. always seems to know the answers in math. _____

    e. you would like to work with on a social studies project because you know s/he would do a good job. _____

    f. most always has the best report or project. _____

15. has the most interesting and unusual ideas. _____

16. becomes unhappy if his/her work is not perfect. _____

17. likes to do harder projects. _____

18. cares about other people's feelings and likes things to be fair. _____

19. is always making up and telling jokes or using puns. _____

20. already knows the math facts or spelling words and doesn't like to practice them. _____

21. writes or tells the most interesting stories. _____

22. looks for new and different things to do. _____

Developed by Charlene Balzer, ExCEL Coordinator 1990
West Union School District
Route 5 Box 230, Hillsboro, Oregon 97124 503/647-5356

APPENDIX C

Possible Tests for Use in Measuring TAG

Referral and Initial Screening
Measuring Instruments

The primary sources for information concerning tests and other measurement instruments are the books by O.K. Buros, Mental Measurements Yearbook and Tests in Print. Thousands of tests are reviewed in these books. However, in neither index is it possible to find a section on "Tests for the Gifted." This is the first indicator that school districts face a major problem in the identification of gifted students.

At present, those responsible for the identification and selection process must rely on published or informal instruments that only relate to the concept of giftedness. However, such instruments have been found useful in matching a school district's philosophy and definition of giftedness.

The preferred procedure for referral and initial screening is to use both formal and informal instruments. Formal instruments are those that have been standardized and may be individually or group administered. They are available for measuring both intellectual ability and academic performance.

Informal instruments are usually used for obtaining information concerning behavioral or learning characteristics. These may include the following:

1. Teacher observation checklists
2. Parent checklists
3. Peer group identification
4. Student self-reporting forms

The following annotated descriptions of formal instruments are provided to aid school districts in the stage of Referral and Initial Screening in identifying gifted students.

Individual Intelligence Tests

Stanford-Binet (S-B)
Wechsler (WISC-R)
WISC-R Split Half Short Form
Slosson Intelligence Test (SIT)
Kaufman Assessment Battery for Children (K-ABC)
McCarthy Scales of Children's Abilities (MSCA)

Group Intelligence Tests

SOI Learning Abilities Test
Otis-Lennon School Ability Test
Test of Cognitive Skills
Cognitive Abilities Test
Developing Cognitive Abilities Test
Ross Test of Higher Cognitive Processes
Cattell Culture Fair Intelligence Series

Achievement

Comprehensive Tests of Basic Skills
Iowa Test of Basic Skills
Metropolitan Achievement Test
Sequential Tests of Educational Progress
Science Research Associates Achievement Test
Stanford Achievement Test
California Achievement Test
Educational Development Series

Characteristics and Behaviors

Screening Assessment for Gifted Elementary Students
SOI Gifted Screening Form
Watson-Glasson Critical Thinking Appraisal
Standard and Advanced Progressive Matrices
Eby Elementary Identification Instrument
Eby Gifted Behavior Index
Gifted and Talented Screening Form
Multi-Dimensional Screening Device
Pre-school Talent Checklists
Scales for Rating Behavioral Characteristics of Gifted Children

Individual Intelligence Tests

The Stanford-Binet Intelligence Scale (S-B), Third Revision

Authors: Lewis M. Terman et. al.
Publisher: Riverside Publishing Company
Ages: 2 and over
Administered by: Registered Psychologists only
Time for Administration: 30-90 minutes
Score: A single Intelligence Quotient (IQ) Score (m=100, s.d.=16)
Assesses: General Intelligence — a composite of verbal ability, math reasoning, memory, visual discrimination and general information.
Use in Gifted Identification: Measures general intellectual ability.
Advantages: Widely respected by psychologists and educators as an accurate predictor of school performance.
Disadvantages: The results are reported in one single score. Does not distinguish an individual's strengths and weaknesses. Time and expense involved in the individual administration by a psychologist.

Wechsler Intelligence Scale for Children-Revised (WISC-R)

Author: David Wechsler
Publisher: The Psychological Corporation
Ages: 6-16
Administered by: Registered Psychologist
Time for Administration: 50-75 minutes
Scores: Verbal, Performance and Total Scores (m=100, s.d.=15)
Assesses: General Intelligence
Sections: Verbal includes information, comprehension, arithmetic, similarities, vocabulary and digit span. Performance includes picture completion, arrangement, block design, object assembly, coding and mazes.
Use in Gifted Identification: Measures general intellectual ability.
Advantages: Provides information regarding the subject's general intelligence, and also provides clues to relative strengths and weaknesses of the individual based upon the subtests and the psychologist's observations of the child during testing.
Disadvantages: Time and expense involved because it must be administered and interpreted by an education psychologist.

WISC-R Split Half Short Form

Author: Kenneth L. Hobby
Publisher: Western Psychological Services
Ages: 6-16
Administered by: School Psychologist
Time for Administration: Half as long as the WISC-R
Scores: Same as the WISC-R
Use in Gifted Identification: May appeal to program personnel who use the WISC-R.
Advantages: By using odd numbered items only, this form of the WISC-R takes only half the time to administer.
Disadvantages: Minimal research on this shortened version of the WISC-R. Time saved may lower validity.

Slosson Intelligence Test (SIT)
Author: Richard L. Slosson
Publisher: Slosson Educational Publications, Inc.
Ages: 2 weeks and over
Purpose: General Intelligence Test designed as a screening measure to correspond to the Stanford-Binet.
Administered by: Teacher or other trained adult
Time for administration: 20-40 minutes
Scores: One composite score
Assesses: General intelligence as a function of vocabulary, verbal and math reasoning, and memory.
Use in Gifted Identification: Used to screen for general intellectual ability.
Advantages: May be administered by a teacher.
Disadvantages: Scores are generally higher than S-B or WISC-R scores. Reviews recommend using only as a tool for screening students.

Kaufman Assessment Battery for Children (K-ABC)
Authors: Alan and Nadeen L. Kaufman
Publisher: American Guidance Service
Ages: 2.5 - 12.5
Administered by: School Psychologist
Time for Administration: 35-85 minutes
Scores: Two global scores on Mental Processing and Achievement
Assesses: Intelligence (defined as a function of mental processing) and Achievement
Use in Gifted Identification: Has application to early primary identification of children with unusually high mental processing abilities.
Advantages: Incorporates most recent developments in both theory and statistical methodology. Special attention is given to children with handicaps, learning disabilities and cultural and linguistic deficiencies.
Disadvantages: Developed only for primary age children.

McCarthy Scales of Children's Abilities (MSCA)
Author: Dorothea McCarthy
Publisher: The Psychological Corporation
Ages: 2.5 - 8.5
Administered by: School Psychologist
Time for Administration: 45-60 minutes
Scores: Composite (General Cognitive Index) plus 5 subscores for verbal, perceptual/performance, quantitative, memory, and motor abilities.
Assesses: General cognitive ability
Use in Gifted Identification: May be used for primary identification.
Advantages: Provides a diagnostic profile of five separate components of intelligence.
Disadvantages: Designed only for primary children.

Group Intelligence Tests

S.O.I. Learning Abilities Test

Authors: Mary and Robert Meeker, adapted from Guilford's work
Publisher: Western Psychological Services
Ages: Grades 2-12
Administered by: Any teacher or trained adult
Time for Administration: Untimed, approximately 110 minutes
Scores: 26 scores on 26 of the factors of intelligence described by Guilford, including cognition, memory, convergent production, divergent production and evaluation on verbal, figural and mathematical tasks.
Use in Gifted Identification: Most appropriate for programs based upon Guilford's Structure of the Intellect theory.
Advantages: Can be administered in a classroom. Provides very specific profiles of strengths and weaknesses for each child. Prescriptions may then be written to fit each child's needs.
Disadvantages: The test assesses factors unique to Guilford's definition of intelligence. Therefore, it is restrictive in its use in programs designed for other purposes.

Otis-Lennon School Ability Test (OLSAT)

Authors: Arthur Otis and Roger Lennon
Publisher: The Psychological Corporation
Ages: Grades 1-12
Administered by: Classroom Teacher
Time for Administration: 45-60 minutes
Scores: One composite score called the School Ability Index based upon verbal, numerical and figural items presented in a spiral order.
Use in Gifted Identification: Frequently used as a measure of general intellectual ability.
Advantages: Ease of administration and scoring. Items are offered which test cognition, convergent thinking and evaluation.
Disadvantages: Low ceiling. Verbal-educational orientation is often considered a limited conception of giftedness.

Test of Cognitive Skills (TCS)

Authors: Not provided
Publisher: CTB/Macmillan/McGraw-Hill
Ages: Grades 2-12
Administered by: Classroom Teacher
Time for Administration: 50-60 minutes
Scores: One composite score (Cognitive Skills Index) and four subscores: sequences, analogies, memory, verbal reasoning
Use in Gifted Identification: Can especially be used as a measure of general intellectual ability if abstract abilities are highly valued.
Advantages: Ease of administration, scoring. Less emphasis is placed on classroom knowledge than other group tests. Does not have vocabulary or math problem items. Items primarily test abstract reasoning and ability to recall new information.
Disadvantages: Lower ceilings than individual tests. Reliability and validity information is limited.

Cognitive Abilities Test (CogAT)
Authors: Robert Thorndike and Elizabeth Hagen
Publisher: Riverside Publishing Company
Ages: Grades K-12
Administered by: Classroom Teacher
Time for Administration: 50-60 minutes
Scores: Verbal, Quantitative and Nonverbal scores for grades 3-12. Primary test (K-2nd grade) provides only one score.
Use in Gifted Identification: Widely used in both screening and identification of children for gifted programs because it is given as part of the assessment battery which includes the Iowa Test of Basic Skills, a widely used standardized achievement test.
Advantages: Subtest scores are useful in screening children for programs with a verbal, quantitative or nonverbal orientation. Information about non-English speaking children can be gained from the nonverbal subtest.
Disadvantages: Low ceilings usually result lower than they would on an individual IQ test.

Developing Cognitive Abilities Test (DCAT)
Authors: D. Beggs, J. Mouw, J. Cawley, J. Wich, J. Smith, M. Cherkes, A. Fitzmaurice, L. Cawley
Publisher: American Testronics
Ages: 2-12
Administered by: Classroom Teachers
Time for Administration: 50-60 minutes
Scores: Composite score plus three subtest scores: verbal ability, quantitative ability, spatial ability.
Use in Gifted Identification: Has an orientation to Bloom's Taxonomy, which is widely used in gifted education programs.
Advantages: Items have been designed to measure ability in terms of Bloom's Taxonomy of Educational Objectives.
Disadvantages: Instrument is comparatively new, therefore, research on the reliability and predictive validity is minimal.
Other Comments: Items were designed by those who believe cognitive ability can be nurtured or developed through environmental experiences.

Ross Test of Higher Cognitive Processes
Authors: John and Catherine Ross
Publisher: Academic Therapy Publications
Ages: Grades 4-6
Administered by: Teacher
Time for Administration: Timed - 105 minutes
Scores: Total score and eight subtest scores are provided with norms for gifted and nongifted students. Eight subtests measure Deductive Reasoning, Missing Premises, Abstract Relations, Sequential Synthesis, Questioning Strategies, Analysis of Relevant and Irrelevant Information and Analysis of Attributes
Use in Gifted Identification: Interest is increasing in this test as a measure of a student's higher level thinking processes.
Advantages: Like Developing, Cognitive Abilities Test (DCAT) is based upon Bloom's Taxonomy.
Disadvantages: Highly verbal. Not recommended for non-English speaking students.

Cattell Culture Fair Intelligence Series
Authors: Raymond and A.K. Cattell
Publisher: Bobbs-Merrill Company, Inc.
Ages: 8 to adult
Administered by: Teacher

Time for Administration: 25 minutes
Scores: General Intelligence Score as a composite of subtests on Classification, Series and Matrices.
Use in Gifted Identification: Often used as a general screening instrument for abilities in language or culturally deficient students.
Advantages: Culture and language are not being assessed.
Disadvantages: A short test that may not provide a complete assessment of intelligence.

Achievement Tests

Comprehensive Tests of Basic Skills (CTBS)
Publisher: CTB/Macmillan/McGraw-Hill
Grades: K-12
Time for Administration: 2 1/2 hours
Scores: Percentiles, grade equivalents, scaled scores
Measures: Basic skills in reading, spelling, math, reference skills, language, science, social studies
Comments: Assesses basic skills only.

Iowa Test of Basic Skills (ITBS)
Publisher: Riverside Publishing Company
Grade levels: Primary battery K-2, Multilevel Edition Grades 3-9
Time for Administration: 2 hours, 19 minutes
Scores: Grade and age equivalents, standard scores, percentile ranks
Measures: Vocabulary, reading comprehension, spelling, language, reference, math concepts, math problem solving, math computation
Comments: Assesses basic skills only. Students may be given tests above their grade level.

Metropolitan Achievement Test (MAT)
Publisher: The Psychological Corporation
Grade levels: 1.5-12
Time for Administration: 85-316 minutes depending upon level
Scores: Scaled scores, percentile ranks, stanines, grade equivalents
Measures: Reading, math, language, science, social studies
Comments: Assesses basic skills only.

Sequential Tests of Educational Progress (STEP)
Publisher: Addison-Wesley Testing Service
Grade levels: 3-12
Time for Administration: 40 minutes per test
Scores: Raw scores, standard scores, percentile bands, stanines
Measures: Reading, math, listening, writing skills, science, social studies
Comments: Designed for both assessment of individual achievement and for program evaluation in the basic skill areas.

Survey of Basic Skills (SBS)
Publisher: CTB/Macmillan/McGraw-Hill
Grade Levels: K-12
Time for Administration: 130-140 minutes plus optional EAS 25-35 minutes
Scores: Percentile ranks, grade and age equivalents in 11 to 18 achievement test scores depending on level plus optional Education Ability Score.

Measures: Reading (vocabulary, comprehension, total), Math (concepts, computation. total), Language arts (mechanics, usage, spelling, total), composite plus optional EAS scores (verbal, nonverbal, total)
Comments: Entire battery combines both achievement and group ability tests.

Stanford Achievement Test
Publisher: The Psychological Corporation
Grade Levels: 1-10
Time for Administration: 190-320 minutes depending upon level
Scores: Percentile ranks, stanines, grade and age equivalents, scaled scores and total scores
Measures: Vocabulary, reading, reading comprehension, word study skills, math concepts, math computation, listening, spelling, comprehension, social studies, science
Comments: Assesses basic skills only.

California Achievement Test (CAT)
Publisher: CTB/Macmillan/McGraw-Hill
Grade levels: 1 to 14
Time for Administration: 89-190 minutes depending upon level
Scores: Percentile ranks, grade placement, stanines, standard scores
Measures: Reading vocabulary and comprehension, arithmetic reasoning and fundamentals, English mechanics, spelling, language and handwriting
Comments: Assesses basic skills only.

Educational Development Series (EDS)
Publisher: Scholastic Testing Service
Grade levels: K-12
Time for Administration: 345-365 minutes in three sessions
Scores: Percentiles, standard scores, stanines, grade scores
Measures: Achievement in basic skills plus optional ability test (Cognitive Skills Quotient) and student's interest in school subjects and career plans.
Comments: Provides information concerning a student's interests and abilities as well as achievement in basic skill areas.

Characteristics and Behaviors

Screening Assessment for Gifted Elementary Students (SAGES)
Authors: Susan Johnson and Ann Corn
Publisher: D.O.K.
Ages: 7-12 years
Administered by: Teacher
Time for Administration: 30-50 minutes
Scores: Three scores for Aptitude, Achievement and Divergent Thinking
Measures: Eligibility for Gifted Programming based upon subtests related to abstract reasoning and aptitude (classification and analogies), school achievement and divergent thinking.
Comments: This newly published instrument was designed especially for gifted identification. The aptitude subtests include a balance of verbal and nonverbal items. Three different aspects of giftedness are assessed: aptitude, achievement, and creativity.

SOI Gifted Screening Form
Authors: Mary and Robert Meeker

Publisher: SOI Institute
Ages: Grades 2-12
Administered by: Classroom Teacher
Time for Administration: Untimed, approximately 90 minutes
Scores: 12 subtests from the SOI Learning Abilities Test (reviewed under Group Intelligence Test Section)
Measures: Creativity, visual and auditory memory, visual perception and convergent production
Comments: Shortened administration time. Represents selected subtests for gifted program screening and selection.

Watson-Glaser Critical Thinking Appraisal
Authors: Goodwin Watson and Edward Glaser
Publisher: The Psychological Corporation
Ages: 9 years to adult
Time for Administration: approximately 50 minutes
Scores: Raw score, percentile rank and stanine rank
Measures: Inference, recognition of assumptions, deduction, interpretation, evaluation of arguments
Comments: Two forms of the test (A and B) can be used as pre and post tests for individual or program evaluation.

Standard and Advanced Progressive Matrices
Author: J.C. Raven
Publisher: The Psychological Corporation
Ages: 8-65 years (standard), adolescents and adults (advanced)
Time for Administration: Untimed, approximately 45 minutes
Scores: Total score and percentile rank
Measure: Abstract mental ability through the use of problems using figures and designs
Comments: A nonverbal test created and normed in Great Britain. Not designed or normed for identification of gifted students.

Eby Elementary Identification Instrument (EEII)
Author: Judy W. Eby
Publisher: Slosson Education Publications, Inc.
Grades: K-9
Completed by: Teacher
Items: 15 items on the Teacher Checklist plus 10 items on a product rating scale entitled the Unit Selection Matrix
Scores: Raw score is calculated on each form
Measures: Based upon Renzulli's definition of giftedness as a combination of above average ability, creativity and task commitment. Items are grouped into these categories.
Comments: The Teacher Checklist is a standard recommendation form. The Unit Selection Matrix attempts to gather data on the basis of assessing children's original products or pre-tasks as part of an identification process. A General Selection Matrix is also provided which allows scores to be weighed with tests and other data.

Eby Gifted Behavior Index (GBI)
Author: Judy W. Eby
Publisher: D.O.K. Publishers, Inc.
Grades: Elementary and Secondary
Completed by: Teacher

Items: Seven different forms are provided, each of which consists of twenty items. The teacher may choose the appropriate form(s) to fill out for a child based upon the child's talent areas.
Scores: Raw scores are calculated for each form.
Measures: Ten gifted behaviors are assessed on a general form or on one of six talent area-specific forms: verbal, visual-spatial, math/science/problem-solving, musical, social/leadership, and mechanical/inventiveness.
Comments: The GBI was validated by correlating the ratings on the forms with independent, outside judgments of the quality of the children's products in their talent area.

Gifted and Talented Screening Form (GTSF)
Author: David Johnson
Publisher: The Stoelting Company
Grades: K-9
Number of Items: 24
Filled out by: Self Report
Scores: Total score of six talent areas
Measures: Talent in academics, intelligence, creativity, leadership, visual arts, performing arts, psychomotor athletics, psychomotor mechanics
Comments: No standardization or validation procedures reported. Relationship to giftedness is not reported.

Multi-Dimensional Screening Device (MDSD)
Authors: Bella Kranz
Publisher: Moorhead State University
Ages: School age children
Time for Administration: Untimed
Scores: Each talent is scored on a scale of one to seven
Measures: Ten talent areas including visual arts, performing arts, creative thinking, specific academic ability, general intellectual ability, leadership, psychomotor, abstract and spatial thinking.
Comments: The MDSD package contains a videotape and print material. The videotape is used to educate teachers to become better identifiers of gifted students. Nomination instruments are provided.

Pre-school Talent Checklists
Authors: Merle Karnes and Associates
Publisher: Institute for Child Behavior and Development, U. of Illinois
Ages: 3-6 years
Items: Nine checklists
Who completes: Parents and teachers
Scores: Raw score totals for each checklist are graphed on an individual profile.
Measures: Intellectual, academic, creative, leadership, visual and performing arts, psychomotor giftedness
Comments: Normed on handicapped preschool children.

Scales for Rating Behavioral Characteristics of Gifted Children
Authors: J. Renzulli, L. Smith, A. White, C. Callahan, R. Hartman
Publisher: Creative Learning Press, Inc.
Grades: Elementary and Secondary
Completed by: Teacher
Items: Ten scales with 10 items on each scale
Scores: Ten subscale scores

Measures: Learning, motivation, creativity, leadership, artistic, musical, dramatics, communication, precision expressiveness and planning.
Comments: Separate scales provide usable information concerning different types of giftedness. Composite score should not be used as a measure of overall giftedness.

Publishers and Achievement/Aptitude Tests

Addison-Wesley 1 Jacob Way Reading, Ma 01867	School and College Ability Tests (SCAT) Sequential Tests of Educational Progress
American Guidance Service, Inc. Publishers Building Circle Pines, MN 55014	Key Math Tests Peabody Individual Achievement Test
Bobbs-Merrill 866 Third Ave. New York, NY 10022	Cattell Culture Fair Intelligence Series
California Test Bureau CTB/Macmillan/McGraw-Hill 2500 Garden Road Monterey, CA 93940	Short Form Tests of Academic Aptitude Test of Cognitive Skills California Achievement Tests (CAT) Comprehensive Tests of Basic Skills Survey of Basic Skills (SBS)
Personnel Press, Inc. 191 Spring St. Lexington, MA 02173	Kulman-Anderson Test
Psychological Corporation 555 Academic Court San Antonio, TX 78204	Otis-Lennon School Ability Test Metropolitan Achievement Tests Stanford Achievement Test Academic Promise Test Differential Aptitude Test
Riverside Publishing Co. 1919 South Highland Ave. Lombard, IL 60148	Gates-MacGinitie Reading Tests Iowa Tests of Basic Skills (ITBS) Cognitive Abilities Test (CogAT) Henmon-Nelson Tests of Mental Ability
Scott, Foresman, & Co. 1900 E. Lake Ave. Glenview, IL 60025	Achievement Series Developing Cognitive Skills
S.O.I. Institute 45755 Goodpasture Road Vida, OR 97488	Structure of the Intellect Learning Abilities Tests

Glossary of Technical Terms

ACHIEVEMENT TEST:
An instrument designed to assess the outcomes of school instruction in specific subject areas, e.g., written language, reading, recognition, reading comprehension, mathematics, etc.

AGE-NORMS:
Indicate how a child at a given age performed on the test. When an individual's score is compared to the scores of same-aged peers. The group of children to whom the child is compared is termed the "normative sample" or "standardization sample."

ALTERNATE FORM RELIABILITY:
The consistency between two forms of a given test. If an individual obtains a given score regardless of whether form A or form B was taken, this would indicate consistency of measurement between the form.

ANECDOTAL RECORDING:
A written description of an incident. Anecdotal recording is important in the teacher nomination process to give additional meaning to the quantitative information in the nomination.

APTITUDE TEST:
An instrument designed to assess an individual's potential. The potential may be general as is the case with global intelligence measure, or a specific aptitude may be assessed in the determination of potential to succeed in learning algebra.

AVERAGE:
Usually refers to the arithmetic mean, but the mode, and median are also measures of central tendency.

CEILING:
The upper limit of a test. This is an important consideration in the use of measures with gifted individuals. When a test is referred to as having limited ceiling, it means that there are not enough difficult questions, i.e., it's too easy. The problem fails to discriminate, among high ability individuals.

COMPOSITE SCORE:
This is a combined or total score. It may be a total score for all the subtests in the test or it may be a total for a subset of subtests. For instance on an achievement test the composite reading score may be formed by grouping an individual's performance on the reading recognition, phonic decoding and reading comprehension subtests.

CONCURRENT VALIDITY:
A form of criterion-related validity, the degree to which the scores on a test relate to an anchor test. The anchor test is usually selected because there is past research on its reliability and validity.

CONSTRUCT VALIDITY:
Accuracy with which a test assesses a hypothetical construct such as intelligence, creativity, or leadership. Construct validation represents cumulative series of studies to determine the degree to which a test measures a given construct.

CONTENT VALIDITY:
The adequacy with which the test assesses a specified domain. The match between the test content, and the specified instructional domain is judged in terms of the degree to which the content represents that domain.

CORRELATION:

A correlation coefficient is a number between -1.0 and 1.0 (inclusive) which indicates the degree of relation between two variables. A 1.0 correlation coefficient indicates a strong positive relationship. This means as one variable increases, so does the other. A correlation of -1.0 indicates an immerse relationship, i.e., as one variable increases the other decreases. A correlation coefficient of 0.0 means that there is no systematic relationship between the variables.

CREATIVE AND PRODUCTIVE THINKING:

Students who exhibit advanced insights, outstanding imagination, and innovation and who consistently engage in integrating seemingly unrelated information to formulate new and positive solutions to conventional tasks. Creativity refers to the students' ability to produce both tangible and intangible end products involving the use of divergent and convergent thinking and problem solving to the extent that they need and can benefit from specially planned educational services differentiated from those generally provided by the general program experience.

CRITERION-REFERENCED TEST:

A test that is organized by content or instructional objectives. A student's performance on a specific group of test items would indicate whether or not the individual has mastered that given skill. Criterion-referenced tests give information on what the student can and can not do.

CRITERION-RELATED VALIDITY:

The degree to which the scores on a test relate to a criterion. See concurrent validity and predictive validity.

ELIGIBILITY

Students are eligible for the talented and gifted program if the district determines that they meet the standard. Additionally, students must demonstrate a need for special programs and/or services in order for the district to provide instruction at the students' instructional level and learning rate.

GIFTED STUDENTS:

Students who excel or have the potential to excel in ability to think, reason, judge, invent, create, or perform and who need special facilities and services in order to assist them to achieve more nearly their potentials for their own sakes as individuals and for the increased contributions they may make to the community, state, and nation.

GRADE-EQUIVALENT SCORE:

A grade equivalent is a score that represents the average performance of students tested in a given month of the school year. A grade-equivalent of 3.2 would represent the typical performance of the national sample of third graders taking the test in the second month of third grade.

GRADE-NORMS:

Indicate how children at a given grade level performed on the test. An individual's score is compared to peers in the same grade placement. This group of peers in the same grade placement is termed the normative sample on the standardization sample.

HALO EFFECT:

Tendency to rate an individual's specific skills based on one's general impression of the individual. If a child is viewed as highly intelligent then the tendency of the rater would be to estimate his or her creativity as high even though the individual's creativity may only be average.

IDENTIFICATION

A process used to screen, evaluate and determine whether students meet either one of the two identification standards described in OAR 581-22-403(1)(A)(B).

INTERNAL CONSISTENCY:
Also referred to as split-half reliability. The consistency of items within a test. The internal consistency is expressed by a correlation coefficient which indicates the degree of relationship among the items within a test.

MATRIX:
A graph showing the abilities of a student in relation to the identification criteria for a program.

MEAN:
The arithmetic average or the sum of the observations divided by the number of observations.

MEDIAN:
The middle occurring score in a ranked distribution of scores, the 50th percentile.

MODE:
The most frequently occurring score in a distribution.

NORMS:
See grade-norms or age-norms.

PERCENTILE:
An indication of relative standing. A percentile rank of 25 means that the individual scored better than 25 out of 100 persons taking the test. Percentile ranks range from a low of 1 to a high of 99, with 50 denoting average performance.

PREDICTIVE VALIDITY:
The degree to which a test can forecast later performance. Predictive validity is crucial with a kindergarten readiness test because the test is designed to predict subsequent performance in kindergarten. The predictive validity of a gifted/talented identification process would be assessed by the success of those selected in the G/T program.

PROFILE:
The set of different test scores for an individual, expressed in a common unit of measure.

RAW SCORES:
A raw score is the number of questions a student has answered correctly. Because subtests differ in length, content, and difficulty, raw scores across subtests or test levels cannot be compared directly of the questions may lead to raw score differences from form to form. A raw score, then, must always be interpreted in relation to the set of questions on which the score was earned. Because of this, raw scores provide limited information about the relative performance of students. If your purpose is to evaluate a student in relation to others or to compare a student's scores across subtests, you should use one or more of the norm-referenced scores.

REFERRAL
A referral process is a screening method which encourages parents, teachers and others to locate and recommend students who may be eligible.

RELIABILITY:
The consistency of a test. Reliability is usually expressed as a correlation coefficient. See Internal Consistency and Test-Retest Stability.

SCREENING

A process for examining the school population in order to 1) "discover" students who may be eligible similar to the child find process used in programs for the handicapped, 2) assemble initial information about students, and 3) determine the next steps in the evaluation of students' eligibility.

SPECIFIC ACADEMIC AREAS:

Language arts, sciences, mathematics, social studies, or any combination of these areas.

STANDARD DEVIATION:

A measure of dispersion of scores in a distribution. It indicates how scores are spread out around the mean. The greater the number of scores clustered around the mean, the smaller the standard deviation.

STANDARD ERROR OF MEASUREMENT:

Also denoted by (SEM or SEm). An estimate of accuracy of test. The standard error of measurement is based on the reliability of the test, i.e., as the reliability increases, the SEM is decreased.

STANDARD SCORE:

A derived score used to represent an individual's performance. Standard scores are tied to the normal curve. Standard score is a generic term for several derived scores, e.g.: T-score, z-score, normal curve equivalent, stanine, etc.

STANDARDIZATION SAMPLE:

A reference group to which an individual's test score is compared. The quality of the standardization sample is judged in terms of its representativeness (sex, ethnic/racial, geographic, age).

STANDARDIZED TEST:

A measure which has (1) prescribed instructions to the examinee, (2) scoring based on a set of predetermined rules, and (3) a normative sample to which an examinee's score(s) is (are) compared.

STANINES:

Stanines are scores that range from a low of 1 to a high of 9, with 5 designating average performance. Stanines, like percentile ranks, indicate a student's relative standing in a reference group. However, since stanines do represent approximately equal units of ability, they are particularly useful for comparing a student's scores across subtests in a stanine profile. Because of their equal-interval property (where the difference in ability as the difference between stanines 5 and 7), stanines also make it easy to identify broad performance categories. Stanine scores of 1, 2, and 3 are usually considered to reflect below-average; 4, 5, and 6 are generally thought of as average; and 7, 8, and 9 are above average. The relationship between percentile ranks and stanines in a normally distributed set of scores is shown in Figure 1.

T-SCORE:

Normalized standard score multiplied by 10 and added or subtracted from 50.

TEST-RETEST STABILITY:

The consistency of a test over time. A stable test is one which gives the same score to an individual when the test is taken twice and separated by a time interval.

VALIDITY:

The extent to which the test assesses what it is purported to measure. See content validity, criterion-related validity and construct validity.

Z-SCORES:

Also called "standard scores a Z-score is" found by taking the difference between an individual's raw score and the mean score of the normative group and then dividing the difference by the standard deviation of the normative group.

A. Nomination/Referral Activities

STEP	WHO	WHEN	HOW	FORM
1.0 Nomination/Referral *				
1.1 Parents are informed they may nominate their child to TAG Team for screening.	- Classroom teacher - Principal - Support personnel/ specialists	- Fall	- Personal contact (phone call, conference) or a note home to the parent. - School newspaper.	
a. Parent wants to refer/nominate.	- Parent	- Anytime	- Complete parent referral form and return to classroom teacher.	- TAG 2
1.2 All students accumulative and behavioral records, grades, placement in curriculum, student products, and test scores are reviewed.	- Classroom teacher - TAG teacher - Support personnel/ specialists	- Late Fall grades 2-6 - Anytime grades K-1	- Based on review of data begin to identify student(s) to be screened for eligibility.	
↕ SIMULTANEOUSLY				
1.3 Identify students with observable behaviors who demonstrate TAG characteristics.	- Classroom teacher - Support personnel/ specialists	- Late Fall grades 2-6 - Anytime grades K-1	- Based on informal observations of students complete the Classroom Screening form.	- TAG 1
1.4 Identify students to be screened by building TAG Team.	- Classroom teacher - TAG teacher and support personnel/ specialists (when appropriate)	- Late Fall	- Based on review of data identify students that may not have visible abilities due to cultural/ethnic differences, environmental considerations, social/emotional factors or a disability. Complete appropriate forms for students to be screened. - Give students the opportunity to refer themselves or others by completing appropriate form(s). - Complete teacher/specialist checklist form on all other students recommended to be screened. - Based on data collected and reviewed complete Case Study form, and attach completed Referral/Checklists/ Survey forms and Classroom Screening form for all students identified to be screened. Guidelines for identifying students to be nominated/referred for screening. - Student performing on standardized test 90% or above (include looking at subtest CogAT). and/or - Student performance data (grades, placement in curriculum, date to date performance, rate of learning, checklists, products). - Student self-referred. - Parent referred. - Peer survey. - Teacher/specialist observation.	- TAG 3 (underachiever) - TAG 4 (behavior) - TAG 5 (bilingual) - TAG 6 (peer survey) - TAG 7 (self referral) - TAG 8 (teacher/ specialist) - TAG 9 - TAG 1-9

*Students who move-in to the district are considered initially at the point records are received.

B. Screening

STEP	WHO	WHEN	HOW	FORM
2.0 Building TAG Team				
2.1 Case study forms, classroom screening form and referrals/checklist survey are reviewed.	Building TAG Team - Principal - TAG teacher - Primary teacher - Intermediate teacher - Others seem appropriate	- Late Fall grades 2-6 - Anytime for move-ins and K-1 grades	- During a scheduled meeting all documents are reviewed and a team decision is made per referred/nominated student(s).	- TAG 1-9 (including only appropriate forms TAG 3-9).
2.2 Eligibility is determined.	Same as above	Same as above	- Based on data provided three decisions can be made: 1. Eligible a. Student is eligible as intellectually gifted if score => 97% (take into consideration standard error of measurement) on at least one Nationally Standardzed test and behavioral/performance data on at least one other item logged on the Case Study form that provides supporting evidence. Complete Identification and Selection form. b. Student is eligible as academically gifted if score => 97% on SBS Composite Score for Reading or Math on a Nationally Standardized test and behavioral/performance data on at least one other item logged on the Case Study form that provides supporting evidence. Complete Identification and Selection form. 2. Further Consideration Evidence of a high score on a subtest, past composite score, past behavioral/performance data and/or descrepancy of information justifies the need to individually evaluate the student and/or to collect additional information before a final decision can be made. Complete Identification and Selection form. 3. Not Eligible Supporting data on Case Study form does not provide enough supporting evidence to be considered completed Identification and Selection form. Place all documents into student behavioral file and place in building designated file cabinet.	- TAG 9 - TAG 10 - TAG 9 - TAG 10 - TAG 9 - TAG 10 - TAG 9 - TAG 10
2.4 Teacher notification of TAG Team dispositions.	TAG teacher	Immediately after review of students screened.	- Notify classroom teacher directly of disposition and the plans for follow-up for appropriate students.	

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C. Evaluation

STEP	WHO	WHEN	HOW	FORM
3.0 Recommended plans outlined on the Identification and Selection form are carried out.				
3.1 Individual/small group assessment is completed.	TAG teacher and/or pertinent others.	As soon as possible	- Parent permission is obtained. - Indiviudal or small group assessment is completed. Assessment tools that could be used are as follows: 1. Grades K - 1 a. CogAT - Cognitive Ability Test (small group or individually administered - 1 hour, 40 minutes). b. KTEA - Kaufman Test of Educational Achievement (individually administered - 1 hour). c. PIAT - Peabody Individualized Achievement Test (individually administered - 1 hour). 2. Grades 2 - 6 a. CogAT - (small group or individually administered - 1 hour, 40 minutes). b. TONI - Test of Non-verbal Intelligence (individually administered - 30 minutes). c. Key Math (individually administered - 1 hour). d. Woodcock Reading Mastery (individually administered - 1 hour). e. PIAT (individually administered - 1 hour). f. Raven Progressive Matices (individually or group administered - 30 minutes). g. Matrix Analogies Test (individually administered - 20 minutes).	- TAG 11
3.2 Collect additional behavioral/performance data.	Designated person as per Identification and Selection form.	As soon as possible	- Checklist(s) is completed and/or - Portfolio is developed by the student (may be teacher/specialist assisted). Maximum of five products (eg., audio/video tape, written work, projects, etc.) may be submitted. and/or - Student/parent interview(s). - Student observation.	- TAG 3-8
3.3 Identify eligible students.	Building TAG team	Soon after additional assessment and/or additional behavioral/ performance data is collected.	Follow steps 2.1 and 2.2	- TAG 9 & 10
3.4 Notification of TAG Team decision - eligible students.	TAG teacher	Upon complete review of of all documentation	- Notify classroom teacher of eligible students. - Notify parents of eligible students via letter. Place a copy of the letter in the student's behavioral file.	- TAG 12

D. Assessment

STEP	WHO	WHEN	HOW	FORM
4.0 Assess eligible students				
4.1 Students are assessed to determine level and rate of learning as per Identification and Selection form.	- Classroom teacher	Immediately after eligibility is determined.	- Observation, student interview, and standardize, criterion referenced, teacher made and/or chapter tests. NOTE: If individual/small group evaluations are planned then follow procedures in section C. Evaluation 3.1.	
4.2 Data is summarized.	Same as above	Immediately after completing assessment.	- Student profile of level and rate of learning is documented for regular tracking.	Form to be developed

Questions & Answers Regarding the Identification of Talented & Gifted Students

Q: What is the difference between identification and eligibility?

A: Identification is a process used to screen, evaluate and determine whether students meet either one of the two identification standards described in OAR 581-22-403(1)(A) and (B). Students are eligible for the talented and gifted program if the district determines that they meet the standard. Additionally, the students must demonstrate a need for special programs and/or services to provide instruction at the students' instructional level and learning rate.

Q: What is the difference between "screening" and "referral" in the identification process?

A: Screening is a process for examining the school population in order to 1) "discover" students who may be eligible, similar to the child-find process used in programs for the handicapped, 2) assemble initial information about students, and 3) determine the next steps in the evaluation of students' eligibility. A referral process is a screening method which employs parents and teachers rather than program staff to locate students who may be eligible.

Q: When screening, must districts test every student in the district?

A: No. Each student determined to be eligible for the talented and gifted program must meet the identification standard in OAR 581-22-403, and the district must collect the required information when determining if the student is eligible.

Achievement test data, because it does already exist for most students, is often used as a part of the screening process. In some districts, group administered tests of intelligence are used as a screening method. The rule does not, however, require that every student in the district, at a particular grade level or in a particular group, be tested.

Q: When can a district use referrals?

A: A referral process is used by some districts to avoid testing every child who does not have a current achievement or mental ability test information available. A

referral system formally solicits names of students who may be eligible from teachers and parents and may, additionally, collect behavioral, learning and/or performance information through the forms and procedures used to document the information through the forms and procedures used to document the referrals. Students who are referred are then further evaluated using tests and other measures needed to determine eligibility.

For primary aged children (grades K-2) a referral rather than group testing as a screening method is preferable. Group test results are of questionable use with young children, and information of better quality and usefulness can be obtained through individual evaluations using tests which are specifically developed for this age group.

Q: What level of test scores are used to determine eligibility?

A: There are three levels of scores within most academic achievement batteries: the total battery (composite), a composite for each test area such as total reading and total math, and subtest scores such as vocabulary or math problem solving. The state basic standards for eligibility uses the composite scores for the test areas of total reading and total math.

The mental ability composite, or total test, score is used for the state basic standard. Some tests only result in a single, composite score. Others have several subtest scores. The standard, however, applies to the total or composite score. In some cases, district staff may have to calculate the composite since some publishers provide only subtest scores in their standard reports.

Q: Can districts use academic test results as a screening method for screening eligibility as intellectually gifted?

A: No. Students who are intellectually gifted may or may not meet the eligibility standard on academic measures, but are still eligible using criteria for intellectually gifted. In some cases, districts will use both achievement and mental ability measures in order to determine eligibility. Conversely, students who may be academically talented do not need to meet the basic standard for intellectually gifted.

A "multiple gating" screening process does not meet the requirement. Students are to be identified for both classifications using either of the basic identification standards. Districts cannot apply both standards to a particular student or group of students.

Q: Can a TAG eligible student be determined ineligible at some later time after being determined eligible?

A: Yes. The district policies and procedures for eligibility apply at any time a student is evaluated. The district, therefore, should conduct evaluations carefully and use good evaluation techniques and decision-making processes to avoid inaccurate identifications.

Districts are not required to conduct reevaluations by rule. They may develop, through local policy and procedures, reevaluation cycles, however.

Q: What about cases when it is not clear if the criteria have been met?

A: When the decision-making group cannot determine whether the student meets criteria, they may select and administer additional measures which will result in information needed to make a decision. Out-of-level testing; individual testing; alternative tests to accommodate disabilities, language, culture or other factors interfering with accurate results; additional behavioral, learning or performance information are examples of additional measures. This is particularly important in cases where students are within the standard error of measurement of the test(s) used and the percentile rank cannot be accurately determined.

If the additional information does not provide clear evidence of eligibility, instructional modifications may be implemented and the student may be evaluated again at a later time.

Q: Does the district need to identify students who demonstrate "potential"?

A: By statute (ORS 343.395(7)), districts are to identify students who demonstrate the potential to perform at the criteria levels described in OAR 581-22-403(1) as part of the definition of talented and gifted students.

OAR 581-22-403(1)(c) provides that districts may identify additional students who demonstrate "potential" but must adopt policies and procedures for their identification.

This option for identification should be considered carefully by school districts for specific non-obvious, talented and gifted students such as handicapped, disadvantaged, culturally and ethnically different, minority, bilingual/non-English speaking and other groups where traditional methods may cause problems with testing and information collection. The procedures districts adopt need to accommodate these issues and establish criteria and appropriate measures including objective tests.

Q: Can you identify students in areas other than academic and intellectual?

A: Yes. Districts may optionally identify students in the areas of leadership, creative/productive thinking, and visual/performing arts as described in OAR 581-22-403(1)(d). The district policies and procedures for identification of these students are required if the option is used, and the district plan must describe the programs and services available. Definitions for these additional categories can be found in ORS 343.395.

Q: How does a district communicate to parents that their child has been found eligible for the TAG program?

A: OAR 581-22-403(3) states that districts must notify parents of the identification of their child for the talented and gifted program in the district. This may be accomplished in several ways including through the mail or at meetings with the parents. The district should document that the parent was notified. For example, a copy of the written notice may be placed in the students' behavioral records.

Parents must also be involved in the evaluation process. OAR 581-21-030 requires contact with and permission from parents concerning some uses of tests.

The Department recommends that parents be used as an information source for learning, performance and/or behavioral information about students as part of the identification process. Referrals from parents should also be solicited as a part of any referral system.

Questions & Answers
Regarding Student Records & Confidentiality
Talented & Gifted Students

Q: Do you need parental permission to collect data?

A: Yes for formal assessment; no if it is part of daily adjustments in program based on student needs.

Q: How do we determine formal behavioral records? What do we do with that?

A: Notes are your own working information. Formal assessment is part of a behavioral record. Any records that help you make your own decision are part of the behavioral record. This information is available only to people who have been defined as having an educational interest. Beyond that you must secure parental permission to give it to other parties. You really need to define who automatically gets to see information in your school and post those names.

Q: Do you mean that consent is needed for everyone who goes to records?

A: The school can designate staff with legitimate educational interest. Those people do not need consent to view the records.

Q: Is the three-year rule for keeping behavioral records a change?

A: Yes, it was just adopted last year by the state archivist after going back through records and determining how long they had been needed in cases.

Q: Often a kid moves back and forth and the behavioral packet is gone?

A: Sometimes its a good idea to keep copies if student transfers frequently.

Q: In TAG youngsters may be academically identified. Do these records go in a behavioral file?

A: To the extent that you use this information to determine eligibility you would include it. You may collect information as you need it including the comments of teachers. Anytime a portion is behavioral, unless the behavioral portion can be separated, treat the entire document as behavioral information.

Q: If TAG information is put in a behavioral file and we send records to another school do we send the behavioral records?

A: Behavioral records cannot be forwarded without parent approval but you can send a probe. You can acknowledge that the student is in a certain program and then progress information can be forwarded and the behavioral records will be released with consent.

Q: Some of the classes use the SOI. Is it a behavioral record?

A: Yes, it's a specific test to define cognitive abilities.

Q: What about challenges?

A: You must respond immediately. Let the parents come in and share the records in the presence of staff who can interpret the information. Suggestion: Keep a record longer than the three years if there was a challenge. The school should have a policy on how challenges will be handled.

Q: You administer a test, say at grade 2. The student stays seven years. What about the 3-year rule?

A: You can get rid of information when you feel it's no longer useful. It may be superseded by something more relevant. Anytime there's a challenge or contest keep that record!

Q: When placed in a TAG program you wouldn't take a record justifying the initial placement out, would you?

A: No. Keep information if it was used to make a determination. Standards will randomly check to see that basic data is there. An update may be needed. But keep the basic records.

Q: There are a lot of students with records used by people?

A: If these people need that information for decisions they have access to copies. But originals of documents used for placement should be kept in a behavioral record.

Q: Test protocol could be kept elsewhere.

A: Yes, they don't have to be kept with behavioral records. Each behavioral record must be kept according to confidentiality requirements. That means in a fireproof (for one hour) file cabinet for permanent records.

Q: What about 18 year olds?

A: They have access to the records their parents had access to. If they want to deny parent participation they can make that challenge. You may still communicate with parents and have them involved as appropriate. Custodial and noncustodial parent have equal rights regarding access to parent information unless there is a document from the court to the contrary.

Q: Is there a definition of noncustodial parent?

A: Yes. The natural parent who is not the parent the child is residing with and who does not have custody responsibility. It does not include stepparents.

Q: How do you know?

A: You can ask for proof or identification. Exercise extreme caution. The legal guardian can exercise rights to give permission to others to see documents.

Q: What is directory information?

A: Information like height, weight, address, phone, honors. If a parent says no, they do not want information about their child in the directory, then don't include it. You do not have to share designated directory information with anyone who asks. The judgment is with the school.

Q: Can there be some policy about sharing directory information?

A: You need to let parents know what the school has designated as directory information so they can choose whether or not to have their child included. For groups who request this information you can agree or not agree on a case by case basis. It depends on the extent the school feels the request is valid.

Q: Can you release information about TAG students?

A: A good practice is to inform parents and get parental permission.

Q: What if colleges want TAG names?

A: Ask colleges to send information to you and you will distribute it.

Q: Does the parent have to know if a teacher fills out a checklist?

A: You must notify parents before administering tests of ability, personality, and any test not part of the normal screening process.

You need to notify parents whose child you do select for further evaluation. If it leads to formal testing then you must get permission. You don't need to let the parent know that their child was not selected for further assessment or evaluation.

ERIC Clearinghouse on Handicapped and Gifted Children
THE COUNCIL FOR EXCEPTIONAL CHILDREN
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ERIC Digest

DIGEST 344 1985

CHARACTERISTICS OF INTELLECTUALLY GIFTED CHILDREN

There are numerous lists of characteristics or distinguishing features and attributes of gifted and talented children. Teachers and parents should interpret any single list, including this one, as only an example of possible traits.

Few gifted children will display all of the characteristics in a given list; however, when clusters of these characteristics are present, they do serve as fairly reliable indicators. Giftedness may exist in only one area of academic learning, such as mathematics, or may be quite general across the school curriculum. There are some clusters of characteristics found in the general behavior patterns of gifted students as well as in their learning style and their capacity to These characteristics are signals to indicate that a particular child might warrant closer observation and could require child might warrant closer observation and could require specialized educational attention, pending a more comprehensive assessment.

General Behavioral Characteristics

- Many typically learn to read earlier with a better comprehension of the nuances of the language. As many as half of the gifted and talented population have learned to read before entering school. They often read widely, quickly, and intensely and have large vocabularies.
- They commonly learn basic skills better, more quickly, and with less practice.
- They are better able to construct and handle abstractions than their age mates.
- They are frequently able to pick up and interpret nonverbal cues and can draw inferences which other children have to have spelled out for them.
- They take less for granted, seeking the "hows" and "whys."
- They display a better ability to work independently at an earlier age and for longer periods of time than other children.
- They can sustain longer periods of concentration and attention.
- Their interests are often both wildly eclectic and intensely focused.
- They frequently have seemingly boundless energy, which sometimes leads to a misdiagnosis of "hyperactive."
- They are usually able to respond and relate well to parents, teachers, and other adults. They may prefer the company of older children and adults to that of their peers.
- They are willing to examine the unusual and are highly inquisitive.
- Their behavior is often well organized, goal directed, and efficient with respect to tasks and problems.
- They exhibit an intrinsic motivation to learn, find out, or explore and are often very persistent. "I'd rather do it myself" is a common attitude.
- They enjoy learning new things and new ways of doing things.
- They have a longer attention and concentration span than their peers.

Learning Characteristics

- They may show keen powers of observation, exhibit a sense of the significant, and have an eye for important details.
- They may read a great deal on their own, preferring books and magazines written for youngsters older than themselves.
- They often take great pleasure in intellectual activity.
- They have well developed powers of abstraction, conceptualization, and synthesizing abilities.
- They generally have rapid insight into cause-effect relationships.
- They often display a questioning attitude and seek information for the sake of having it as much as for its instrumental value.
- They are often skeptical, critical, and evaluative. They are quick to spot inconsistencies.

- They often have a large storehouse of information regarding a variety of topics which they can recall quickly.
- They show a ready grasp of underlying principles and can often make valid generalizations about events, people, or objects.
- They readily perceive similarities, differences, and anomalies.
- They often attack complicated material by separating it into its components and analyzing it systematically.

Creative Characteristics

- They are *fluent* thinkers, able to produce a large quantity of possibilities, consequences, or related ideas.
- They are *flexible* thinkers, able to use many different alternatives and approaches to problem solving.
- They are *original* thinkers, seeking new, unusual, or unconventional associations and combinations among items of information. They also have an ability to see relationships among seemingly unrelated objects, ideas, or facts.
- They are *elaborative* thinkers, producing new steps, ideas, responses, or other embellishments to a basic idea, situation, or problem.
- They show a willingness to entertain complexity and seem to thrive in problem situations.
- They are good guessers and can construct hypotheses or "what if" questions readily.
- They often are aware of their own impulsiveness and the irrationality within themselves and show emotional sensitivity.
- They have a high level of curiosity about objects, ideas, situations, or events.
- They often display intellectual playfulness, fantasize, and imagine readily.
- They can be less intellectually inhibited than their peers in expressing opinions and ideas and often exhibit spirited disagreement.
- They have a sensitivity to beauty and are attracted to aesthetic dimensions.

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